



## MINUTES

### SELECT BOARD

02/09/2021

Present: Select Board Member Bernard W. Greene, Select Board Member Nancy S. Heller, Select Board member Heather Hamilton, Select Board Member Raul Fernandez, Select Board Member John VanScoyoc

6:00 pm: Remote meeting via ZOOM virtual meeting platform: recorded meeting

#### ANNOUNCEMENTS/UPDATES

Select Board to announce recent and/or upcoming events of community interest.

Chair Greene: February 16, 2021, Representative Jake Auchincloss will attend the Select Board meeting next week. The Board will prepare questions in advance of the discussion.

Congratulations to Officer John Jennings who has been awarded a accreditation for Excellence in Crisis Intervention Training (CIT) from the Department of Mental Health and the National Alliance of Public Health for achieving the criteria and demonstrative commitment to crisis prevention.

Board member Heller: The Centre Street Zoning Committee has a date change; the committee will not be meeting on February 24<sup>th</sup>. The architects have requested more time to work on the plans. We will keep you posted on the meeting dates

Board member VanScoyoc: while following the tyranny trials in Russia threatening their democracy, it is just as important to keep an eye on our impeachment trial. The seriousness has not yet sunk in for many. Our democracy was truly threatened

Board member Fernandez: It was a pleasure meeting with the group Feet First from the Salisbury Hill neighborhood. This is a group of residents over 65 interested in local issues.

Thank you to all that have been showing up to the police task force public hearings.

#### PUBLIC COMMENT

Chair Greene announced that he will be running for reelection as well as Board member Heller. He noted that he anticipates that he will be subject to political attacks and at times he may attempt to respond to them as well as to those supportive of him. With that in mind, Vice Chair Hamilton will conduct the Public Comment portion of the meetings. This is in part due to the suggestion of Mr. O'Neal and also while we work on revising the 5 year old public comment policy. Personal matters will not be allowed.

1. Kea Vanderzeil spoke on the events of the January 6<sup>th</sup> storming of the Capital. She agrees with the comments made by Board member Fernandez, that those that agree with conspiracy theories do not belong in law enforcement and those supportive of the riot should be scrutinized. We have a long history to try to address racism. It is not up to Raul to figure this out, it is up to all of us.

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2. Donelle O'Neal TMM#4 spoke on the new marijuana retail store on Commonwealth Ave and asked about any public hearings to hear what their plans are. We had some horrible experiences with NETA and Sanctuary, plus the racial equity funds have not even been implemented yet.
3. Hajar D a physician assistant and a parent spoke on the reopening of the schools. Brookline has a very good positivity rate with the Covid19 virus; we are the lowest among our neighbors. Schools have been closed almost a year. Looking at the school's budget it is inconceivable that this has been allowed to go on. We need to hold public health officials accountable and there is no reason to maintain the 6 feet distancing. We need to prioritize the mental health of our students.

### MISCELLANEOUS

Question of approving the meeting minutes from Tuesday, February 2, 2021.

On motion it was,

Voted to approve the minutes of February 2, 2021 as amended.

Aye: Bernard Greene, Nancy Heller, Heather Hamilton, Raul Fernandez, John VanScoyoc

### CHANGE ORDER

Question of approving change order #1 to the contract between Vintage Properties Inc., and the Town of Brookline in the amount of \$764.00 for the Putterham Library Bathroom Renovations project.

On motion it was,

Voted to approve change order #1 to the contract between Vintage Properties Inc., and the Town of Brookline in the amount of \$764.00 for the Putterham Library Bathroom Renovations project.

Aye: Bernard Greene, Nancy Heller, Heather Hamilton, Raul Fernandez, John VanScoyoc

### GRANT

Question of accepting a grant in the amount of \$32,409 from the Massachusetts Health Officers Association to the Department of Public Health to support their efforts in Brookline during the ongoing COVID-19 health emergency.

On motion it was,

Voted to accept a grant in the amount of \$32,409 from the Massachusetts Health Officers Association to the Department of Public Health to support their efforts in Brookline during the ongoing COVID-19 health emergency.

Aye: Bernard Greene, Nancy Heller, Heather Hamilton, Raul Fernandez, John VanScoyoc

### CALENDAR

### COVID-19 UPDATE

COVID-19 update from the Department of Public Health.

Town Administrator Kleckner reviewed that the Governor has increased capacity limits in some establishments. Our focus has been on vaccinations. The Lt. Governor was questioned quite a bit by municipal officials on their role to issue the vaccine. It is pretty clear that the State will focus on mass sites and regional centers. We believe we would be better off to design our own way to issue the vaccine, however, at this time we do not have the permission to so, nor do we have the vaccines.

Dr. Jett, Director of Health and Human Services provided an update on the virus and vaccinations.

- The case numbers are dropping
- Phase 2 will be vaccinating those 75 years old and above when vaccines are received.
- The health dept. at this point would not be a big player in vaccinations. Larger sites, CVS and Walgreens will be the sites.
- Schools: Conversation are through the School Committee. Dr. Jett weighs in at the end to review safety protocols

The board discussed the efforts to open schools. Dr. Jett indicated that if the schools move to 3 feet distancing there may be some problems. There was a lot of political pressure to get kids back to schools. Brookline has been in a good position because we stuck to the science of the disease. Once we relax the numbers will increase.

Board member Heller spoke about the growing mental health and eye health effects on children we are seeing due to remote learning. The school committee conveyed panel 4 for science and recommendations relating to safety measures around the schools. Ms. Heller noted that there has been some evidence that the six feet distance apart can be applied when feasible; there has also been some indication from the WHO that 3 feet distance is effective when combined with frequent hand washing, mask wearing and proper ventilation. The Massachusetts public health recommends 6 feet when feasible; we are on the head of a pin here. We want the students to be safe, but also want them to be mentally healthy.

Dr. Jett responded that if you make a rule for one sector you should make it a rule for everybody. If you go to a three feet distance, that should apply to every restaurant, stadium, office etc. Kids carry the same disease, but with fewer symptoms, however they can still spread the virus to adults.

The Board spoke on the School's Expert Advisory Panel 4: Public Health, Safety and Logistics. Chair Greene noted that there are some real issues surrounding communication between this panel and the Advisory Committee on Public Health, and a need to try to work through the differences. Dr. Jett added that they have met, and their difference came out.

Board member VanScoyoc spoke on some testimonies he heard recently from parents. Families are in pain and it is heart wrenching to hear their stories about children that cry every day because of the challenges related to remote learning. Families don't know what to do, and feel like no one is listening to them. We know that Brookline's numbers are better than other communities, and we need to communicate that. He suggested that Dr. Jett hold a weekly zoom meeting for parents to ask questions.

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Dr. Jett responded that he is not the right person to talk to about school related decisions. I get a lot of emails on this, but it is up to the School Committee on reopening decisions, I just review the reopening plan to determine if safety protocols are captured correctly.

Town Administrator Kleckner added that the elected school committee is required to balance the risk and welfare of the children and they need the best information possible to help inform them. If this board wants to get involved, they can contact them. There is a reason why none of the other communities are back to school; Brookline is leading the road to reopening schools.

Board member Fernandez asked about the connection between the elected school committee members, the administration and a school union advocating the safety of teachers. Is there anyway, if not now, to vaccinate the teachers to move the process forward. He also asked why those with asthma are not included in the earlier phase groups for the vaccine.

Dr. Jett responded that he did sign a letter to the Governor on being a hub to vaccinate teachers, the reply was no. Also, if had had the vaccine he would vaccinate those members with asthma.

### 2020 AUDIT REPORT

Craig Peacock of Powers and Sullivan and members of the Audit Committee will appear to present the 2020 Audit Report.

Chair Greene gave an overview of the Audit Committee that is comprised with capable people and three of the members are appointed by the Moderator. He provided a brief review of the documents and introduced the audit firm, Powers and Sullivan.

Craig Peacock, Powers and Sullivan, reviewed the FY2020 audit. This is an unmodified opinion with no significant inefficiencies to report as indicated in the Management Letter.

#### *Opinions*

*In our opinion, the financial statements referred to above present fairly, in all material respects, the respective financial position of the governmental activities, the business-type activities, each major fund, and the aggregate remaining fund information of the Town of Brookline, Massachusetts, as of June 30, 2020, and the respective changes in financial position and, where applicable, cash flows thereof for the year then ended in accordance with accounting principles generally accepted in the United States of America.*

#### *Other Reporting Required by Government Auditing Standards*

*In accordance with Government Auditing Standards, we have also issued our report dated December 15, 2020 on our consideration of the Town of Brookline, Massachusetts' internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, grant agreements and other matters. The purpose of that report is to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on the internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with Government Auditing Standards in considering the Town of Brookline's internal control over financial reporting and compliance*



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### Key points

- There was an overall decrease in the liabilities due to the good performance in the pension market. (\$26.4 million decrease)
- There were four comments last year; three have been resolved, and one partially resolved with some progress made.
- This year there are two new comments around student activity funds

### Q&A

Board member Heller asked about rotating the auditing firm as recommended by BFAC. Chair Greene responded that the Audit Committee did not feel that with the COVID climate, this was not the best time to go out for an RFR.

Board member Fernandez asked about the prior outstanding receivables and if they were resolved. Notably the outstanding parking ticket collections.

Jeana Franconi, Finance Director responded that they are treated like excise tax collections. With parking tickets, if not paid at some point they are tied to the vehicle registration and if someone tries to register the vehicle, renew a license etc., it will be flagged and not released until the outstanding ticket is paid. She is confident they will eventually be paid. That said it is difficult to collect outstanding tickets from students, once they leave the state it is difficult to collect from out of state vehicles.

Board member VanScoyoc would like more detail provided on how the prior years' comments were resolved, especially since there is still a large amount in the uncollected parking ticket receivables.

Ms. Franconi said that they are able to collect in perpetuity, or the life cycle of the ticket. If it continues to be unpaid we will mark the vehicle. She explained the cycle process.

Board member VanScoyoc asked about tracking the progress of paying down the pension liability. Mr. Peacock explained the process that includes looking at service cost for current employees and the past service cost. The Town of Brookline is still on target to meet their 2030 goal; many communities have extended it out beyond that.

On motion it was,

Voted to accept the 2020 Audit Report.

Aye: Bernard Greene, Nancy Heller, Heather Hamilton, Raul Fernandez, John VanScoyoc

### PIERCE SCHOOL BUILDING COMMITTEE

Question of approving the appointment of Andy Liu to fill the vacant School Committee position on the Pierce School Building Committee.

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Chair Greene explained that this is a requirement from the MSBA. It relates to replacing School Committee member Suzanne Federspiel with a new committee member. The new member, Andy Liu is a Pierce School parent.

On motion it was,

Voted to approve the appointment of Andy Liu to fill the vacant School Committee position on the Pierce School Building Committee.

Aye: Bernard Greene, Nancy Heller, Heather Hamilton, Raul Fernandez, John VanScoyoc

### 32 MARION ST. PROJECT ELIGIBILITY LETTER

Question of authorizing the Chair to execute a letter to the Department of Housing and Community Development (DHCD) conveying the Select Board's comments on an application submitted to DHCD for a Project Eligibility Letter relative to 32 Marion Street in order to apply to the Town for a Comprehensive Permit under c.40B.

Planning Director, Alison Steinfeld noted that there were no additional comments from the Select Board. The letter will be submitted by this Friday with all the submitted comments.

On motion it was,

Voted to authorize the Chair to execute a letter to the Department of Housing and Community Development (DHCD) conveying the Select Board's comments on an application submitted to DHCD for a Project Eligibility Letter relative to 32 Marion Street in order to apply to the Town for a Comprehensive Permit under c.40B.

Aye: Bernard Greene, Nancy Heller, Heather Hamilton, Raul Fernandez, John VanScoyoc

### SMALL BUSINESS DEVELOPMENT COMMITTEE CHARGE

Discussion and possible vote on changes to the charge of the Small Business Development Committee.

Board member Fernandez reviewed some changes to the language that pays special attention to minority and women owned businesses. The changes expand upon that to include all the different kinds of minority run businesses. Also, when originally submitted, they did not cap the number of members and did not stagger the terms; they want to do that.

On motion it was,

Voted to accept the changes to the charge of the Small Business Development Committee.

Aye: Bernard Greene, Nancy Heller, Heather Hamilton, Raul Fernandez, John VanScoyoc

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### BROOKLINE HOUSING AUTHORITY PARTNERSHIP PROPOSAL

Discussion and vote on a proposed partnership process between the Town of Brookline and the Brookline Housing Authority.

Board member Fernandez noted that he presented this proposal awhile back, but questioned the change from a partnership committee to a working group as offered by Chair Greene.

Chair Greene responded that this model has been a successful tool used to gather staff to work through the issues. It can be more effective when dealing with those involved and provides the ability to take immediate action to solve problems. He thinks this is a good way issues with the BHA has can be brought to the Town without requiring a whole lot of formalities.

Board member Heller asked about the non-parallel structure of the Co-chairs. She proposed that since a Select Board member will be a co-chair, perhaps the BHA Board Chair should also be a co-chair.

Michael Jacobs, BHA Commission Chair announced that he has no issues with being the co-chair; he will be working closely with BHA Director Mike Alperin.

On motion it was,

Voted to accept the recommendation for the Brookline Housing Authority Partnership to establish a working group with one Select Board member and one Brookline Housing Authority Commission member as co-chairs.

Aye: Bernard Greene, Nancy Heller, Heather Hamilton, Raul Fernandez, John VanScoyoc

### REMOTE TOWN MEETING REQUEST

Question of authorizing the remote town meeting request as submitted by the Town Moderator, Sandy Gadsby.

Board member Fernandez noted that this relates to the language around registered voters. It seemed to indicate that non registered voters could not participate in the Town Meeting process. The Moderator has revised the document.

On motion it was,

Voted to authorize the remote town meeting request as submitted by the Town Moderator, Sandy Gadsby.

Aye: Bernard Greene, Nancy Heller, Heather Hamilton, Raul Fernandez, John VanScoyoc

### BOARDS AND COMMISSIONS - APPOINTMENTS

The following candidates for appointment/reappointment to Boards and Commissions:

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### Cannabis Mitigation Advisory Committee

On motion it was,

Voted to appoint Danny Stone to the Cannabis Mitigation Advisory Committee for a term ending August 31, 2022, or until a successor can be appointed. Mr. Stone will be a representative of the Coolidge Corner area.

There being no further business the Chair ended the meeting at 8:00 pm.

ATTEST



Charles D. Baker, Governor  
 Karyn E. Polito, Lieutenant Governor  
 Stephanie Pollack, MassDOT Secretary & CEO  
 Astrid Glynn, MassDOT Rail & Transit Administrator



Maria Foster  
 Town of Brookline  
 333 Washington Street  
 Brookline, MA 02446

Dear Ms. Foster,

On behalf of Governor Baker and Lieutenant Governor Polito, I am pleased to notify you that the Town of Brookline has been competitively selected to receive a State Fiscal Year 2021 Community Transit Grant Program award for the following project(s):

**Digital Mobility Mentorship (BCG0009439)** in the amount of **\$66,400** (to be matched with **\$16,600** in local funds)

Through this funding, we hope to ensure that you continue to provide meaningful transportation options for older adults and individuals with disabilities in Massachusetts.

In the coming weeks, you will receive further instructions from the MassDOT Transit Unit detailing next steps. Please feel free to contact Jennifer Henning ([jennifer.n.henning@dot.state.ma.us](mailto:jennifer.n.henning@dot.state.ma.us)) if you have any questions.

Thank you again for your continued commitment to improving mobility in the Commonwealth.

Sincerely,

Stephanie Pollack  
 Secretary and CEO, Massachusetts Department of  
 Transportation



**TOWN OF BROOKLINE**  
*Massachusetts*  
**DEPARTMENT OF PUBLIC WORKS**

*Erin Chute Gallentine*  
 Commissioner

## Memorandum

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To: Select Board  
 School Committee  
 Building Commission

From: Erin Chute Gallentine – Commissioner of Public Works

Date: February 9, 2021

Re: Award of Cypress Street Playground PW /20-15

Cc: Rob Kefalas, PE, Project Engineer  
 Scott Landgren, Landscape Architect

I respectfully submit for the Board's review and approval, a request to award and execute Contract No. PW/20-15 "Cypress Street Playground" with Heimlich Landscape and Construction Corp., 65R Burlington Street, Woburn, MA, 01801, in the amount of \$5,263,523.00. The amount includes the total base bid with alternates.

On Thursday, June 18, 2020, proposals for "Cypress Street Playground" Contract Number PW/20-15, were publicly opened and read aloud. Six (6) bids were received, summarized below in ascending order of the estimated total contract price bid:

	<b>Base Bid</b>	<b>with Alternates (1-5)</b>
1. Heimlich Landscape and Construction Corp.	\$4,767,433.00	\$5,263,523.00
2. Mountain View Landscape Corp.	\$5,382,234.00	\$5,893,944.00
3. Argus Construction Corp.	\$5,411,983.00	\$6,002,533.00
4. David White and Sons	\$5,741,344.20	\$6,239,387.60
5. WES Construction	\$6,574,977.00	\$7,014,177.00
6. David Roach and Son's	\$9,329,160.00	\$9,812,190.00

The Cypress Playground renovation project includes installation of an inclusive playground for older and younger children, improved handicapped accessibility including new ADA compliant ramps and walkways, a new lighted natural turf sports field and infields with subsurface drainage system, improved pedestrian lighting, new fencing, ballfield backstops, a new basketball court with lighting, seating, picnicking areas, covered players benches, water play, irrigation, improved drainage, two stormwater infiltration systems, trees, and other plantings.

## 4.C.

The Public Design Review Process for the Cypress Street Playground Improvement Project commenced on December 12, 2018. It continued with seven public Design Review Committee meetings, culminating with a final Park and Recreation Commission meeting on November 12, 2019, approving the design. Through the 11-month public design review process, the team prepared a plan that met the Town's goals of a safe, inclusive, multi-generational, and accessible park design that would serve the community, the neighborhood, the High School student body, the Athletic Department, and the Recreation Department.

Funding for the project was approved by Town Meeting in November 2020. The full project was value engineered to stay within budget and then further broken down to have a core base bid with alternates. The alternates are all important components of the project voted on and supported by the Design Review Committee. The five alternates include field seating with walkways, a composite wood deck picnic area with an accessible ramp, four covered dugout structures, additional play equipment at the playground, and site furniture.

**The Department of Public Works respectfully recommends that the board award and execute Contract No. PW/20-15 "Cypress Street Playground" with Heimlich Landscape and Construction Corp., 65R Burlington Street, Woburn, MA, 01801, in the amount of \$5,263,523.00.**



**TOWN OF BROOKLINE**  
*Massachusetts*  
**DEPARTMENT OF PUBLIC WORKS**

*Erin Chute Gallentine*  
Commissioner

## **Memorandum**

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To: The Select Board  
From: Erin Chute Gallentine - Commissioner of Public Works  
Date: February 9, 2021  
Re: Award of Cypress Street Playground Construction Administration Services Contract  
Cc: Scott W. Landgren, RLA – Senior Landscape Architect Parks and Open Space Division

For your meeting on February 9, 2021, I respectfully submit for your approval, a request to award and execute the Construction Administration contract to Weston and Sampson Engineers, Inc, to assist the Town in construction oversight of Contract PW/20-15, for the Cypress Street Playground project, in the total amount of \$96,000.00. The related construction work contract of Contract PW/20-15 for the Cypress Street Playground is covered under a separate memorandum.

Weston and Sampson and their team of sub consultants, assisted the Town in the assessment and subsequent design and production of contract documents of Cypress Street Playground. In this new contract, Weston and Sampson Engineers, Inc will assist the Town through: attendance at construction meetings, shop drawings review and processing, coordination with the contractor, coordination with the manufacturers' representatives, construction oversight services, pay applications review, response to contractor request for information, issuance of sketch plans and clarifying documents, value engineering and design adjustments, and other assistance as requested by the town.

The Department of Public Works respectfully recommends that the Select Board **award** and **execute** this contract with Weston and Sampson Engineers, Inc, 85 Devonshire Street, 3<sup>rd</sup> Floor, Boston, MA 02109 in the amount of \$96,000.00.

Thank you for your time and consideration in regards to this project.



AGREEMENT FOR LANDSCAPE ARCHITECTURE  
AND ENGINEERING SERVICES  
BY AND BETWEEN THE  
TOWN OF BROOKLINE  
AND  
WESTON & SAMPSON ENGINEERS, INC.

THIS AGREEMENT is made this \_\_\_\_ day of \_\_\_\_\_, 20\_\_, by and between the Town of Brookline, Massachusetts acting herein by and through its Department of Public Works-Parks and Open Space Division, hereinafter called the OWNER and WESTON & SAMPSON ENGINEERS, INC., with offices at 85 Devonshire Street, Floor 3, Boston, Massachusetts 02109, hereinafter called the ENGINEER.

WITNESSETH, for the consideration hereinafter set forth, the parties hereto agree as follows:

ARTICLE 1 - ENGAGEMENT OF THE ENGINEER AND STANDARD OF CARE

- 1.1 THE OWNER hereby engages the ENGINEER, and the ENGINEER hereby accepts the engagement to perform certain professional engineering services for the Cypress Street Playground and Athletic Field Improvements in Brookline, Massachusetts hereinafter called the PROJECT.
- 1.2 The ENGINEER's services shall be performed in a manner consistent with that degree of skill and care ordinarily exercised by practicing design professionals performing similar services in the same locality, at the same site and under the same or similar circumstances and conditions. The ENGINEER makes no other representations or warranties, whether expressed or implied, with respect to the services rendered hereunder.

ARTICLE 2 - SCOPE OF SERVICES

- 2.1 The Scope of Work includes construction phase services for the referenced project. Our efforts will be in support of town staff members representing the Brookline Parks and Open Space and Engineering/Transportation Divisions of Public Works. Under this effort, we anticipate performing the following tasks:
  - A. Attendance at a pre-construction meeting
  - B. Attendance at weekly construction meetings
  - C. Meeting notes
  - D. Shop drawing review and processing
  - E. Coordination with the general contractor and subcontractor(s)
  - F. Coordination with manufacturer's representatives, material suppliers and other vendors
  - G. Clerk of work services (as requested) to include site visits to observe work in progress
  - H. Pay application review and approval (as requested)
  - I. Additional work (change order) requests and negotiation/confirmation of pricing
  - J. General, daily availability to respond to contractor inquiries and RFI's
  - K. Issuance of sketch plans and other clarifying documents
  - L. Value engineering and design adjustments

## 4.C.

- M. Verification of unit quantities (as needed for a unit price project)
- N. Other assistance required by the town

### ARTICLE 3 - RESPONSIBILITIES OF THE OWNER

The OWNER, without cost to the ENGINEER, shall do the following in a timely manner so as not to delay the services of the ENGINEER:

- 3.1 Designate in writing a person to act as the OWNER 's representative with respect to work to be performed under this AGREEMENT, such person to have complete authority to transmit instructions, receive information, interpret and define the OWNER'S policies and decisions with respect to materials, equipment elements and systems pertinent to the work covered by this AGREEMENT.
- 3.2 Assist the ENGINEER by placing at the disposal of the ENGINEER, all available information pertinent to the PROJECT including previous reports and any other data relative to design or construction of the PROJECT.
- 3.3 Arrange for access to and make all provisions for the ENGINEER to enter upon public and private lands as required for the ENGINEER to perform its work under this AGREEMENT.
- 3.4 Furnish the ENGINEER all needed property, boundary and right-of-way maps.
- 3.5 Cooperate with and assist the ENGINEER in all additional work that is mutually agreed upon.
- 3.6 Pay the ENGINEER for work performed in accordance with the terms specified herein.
- 3.7 Provide full information as to OWNER's requirements for the Project, including design objectives and constraints, space, capacity and performance requirements, flexibility and expandability, and any budgetary limitations; and furnish copies of all design and construction standards, which OWNER will require to be included in the Drawings and Specifications.
- 3.8 Attend the pre-construction conference, construction progress and job-related meetings, substantial completion inspections and final payment inspections.
- 3.9 Give prompt written notice to ENGINEER whenever OWNER observes or otherwise becomes aware of any development that affects the scope or timing of ENGINEER's services or any defect or non-conformance of the work of any Contractor(s).

### ARTICLE 4 - TIME OF PROJECT

- 4.1 The ENGINEER will initiate work under this AGREEMENT following formal acceptance of this AGREEMENT by the OWNER. The ENGINEER agrees to provide services for the estimated duration of work, starting January 2021 and concluding June 2022.

## 4.C.

- 4.2 If the specific periods of time for services provided under this AGREEMENT are changed through no fault of the ENGINEER, the rates and compensation provided for herein shall be subject to equitable adjustment.
- 4.3 If ENGINEER's services are delayed or suspended in whole or in part by the OWNER for more than three months through no fault of the ENGINEER, ENGINEER shall be entitled to an equitable adjustment of the rates and compensation to be paid herein.

### ARTICLE 5 - PAYMENTS TO THE ENGINEER

- 5.1 For services performed under this AGREEMENT, the OWNER agrees to pay the ENGINEER up to, but not exceeding, the sum of \$96,000, which shall include labor and expenses. Compensation shall be payable monthly, as earned, and shall be in accordance with the scope of services identified in Article 2. Labor costs for staff shall be calculated using a multiplier of 3.05 times a respective staff persons actual direct hourly rate.
- 5.2 If the OWNER fails to make any payment due the ENGINEER for services and expenses within thirty (30) days after receipt of the ENGINEER'S statement therefore, the ENGINEER may, after giving seven (7) days' written notice to the OWNER, suspend services under this AGREEMENT. Unless the ENGINEER receives payment within seven (7) days of the date of the notice, the suspension shall take effect without further notice. In the event of a suspension of services, the ENGINEER shall have no liability to the OWNER for delay or damage caused the OWNER because of such suspension of services.

### ARTICLE 6 - INSURANCE

#### 6.1 General Liability Insurance

The ENGINEER shall secure and maintain, for the duration of this PROJECT, the following General Liability Insurance policy or policies at no cost to the OWNER. With respect to the operations the ENGINEER performs, the ENGINEER shall carry Commercial General Liability Insurance for bodily injury, death, and property damage in the amount of \$1,000,000 per occurrence and \$2,000,000 in the aggregate.

#### 6.2 Automobile Liability Insurance

The ENGINEER shall secure and maintain, for the duration of this PROJECT, Automobile Liability Insurance covering the operation of all motor vehicles, including those hired or borrowed, used by the ENGINEER in connection with this AGREEMENT, in the amount of \$1,000,000 combined single limit per accident.

#### 6.3 Umbrella Liability Insurance

In addition to the above-mentioned coverage, the ENGINEER shall carry a minimum of One Million Dollar (\$1,000,000) umbrella liability policy for the duration of the PROJECT.

6.4 Professional Services Liability Insurance

The ENGINEER shall secure, at its own expense, a Professional Services Liability Insurance policy with a limit of \$3,000,000 per claim and in the aggregate, and maintain such policy for the duration of the PROJECT.

6.5 Workers Compensation Coverage

The ENGINEER shall maintain statutory Worker's Compensation insurance coverage for all of its employees at the PROJECT as required by the State of Massachusetts.

6.6 Additional Insured

OWNER shall be named an additional insured for insurance coverage included in Articles 6.1, 6.2 and 6.3 only.

ARTICLE 7 - LIMITATION OF LIABILITY AND INDEMNIFICATION

7.1 To the fullest extent permitted by law, the total liability in the aggregate, of ENGINEER and its officers, directors, employees, agents, and independent professional associates, and any of them, to the OWNER and any one claiming by, through or under OWNER, for any and all injuries, claims, losses, expenses, or damages whatsoever arising out of or in any way related to ENGINEER'S services, the project, or this AGREEMENT, from any cause or causes whatsoever, including but not limited to, the negligence, errors, omissions, strict liability, breach of contract, misrepresentation, or breach of warranty of ENGINEER or its officers, directors, employees, agents or independent professional associates, or any of them, shall not exceed the total amount recoverable from the available limits of the insurance identified in Article 6. ENGINEER shall have no upfront duty to defend the OWNER but shall reimburse defense costs of the OWNER to the same extent of its indemnity obligation herein.

7.2 To the fullest extent permitted by law, and subject to the limitation of liability set forth in 7.1, the ENGINEER agrees to indemnify and hold harmless the OWNER and its officers, directors, employees, agents, and independent professional associates, and any of them, from any claims, losses, damages or expense (including reasonable attorneys' fees) arising out of the death of, injuries, or damages to any person, or damage or destruction of any property, in connection with the ENGINEER'S services under this AGREEMENT to the extent caused by the negligent acts, errors, or omissions of the ENGINEER or its officers, directors, employees, agents or independent professional associates, or any of them.

7.3 Hazardous Waste Indemnifications

7.3.1 The ENGINEER and its consultants shall have no responsibility for the discovery, presence, handling, removal or disposal of, or exposure of persons to, hazardous waste in any form at the PROJECT site. Accordingly, the OWNER hereby agrees to bring no claim for negligence, breach of contract, strict liability, indemnity, contribution or otherwise against the ENGINEER, its principals, employees, agents or consultants if such claim in any way arises from such services. The OWNER further agrees to defend, indemnify and

hold the ENGINEER and its consultants and their principals, employees and agents harmless from and against any claims, demands, loss or damage (including reasonable attorneys' fees) sustained by any person or entity arising from such services or circumstances. The ENGINEER shall not be liable for any damages or injuries, of any nature whatsoever, due to any delay or suspension in the performance of its services caused by or arising out of the discovery of hazardous substances or pollutants at the PROJECT site.

7.3.2 The OWNER hereby warrants that, if he or she knows or has any reason to assume or suspect that hazardous materials may exist at the PROJECT site, he or she has so informed the ENGINEER. The OWNER also warrants that he or she has done his or her best to inform the ENGINEER of such known or suspected hazardous materials' type, quantity and location.

7.3.3 If, in the performance of the work, hazardous materials are encountered and are judged by the ENGINEER to be an imminent threat to on-site personnel and/or the general public, the ENGINEER shall take all steps immediately available which are, in his judgment, prudent and necessary to mitigate the existing threat. The OWNER agrees to compensate the ENGINEER for any time spent or expenses incurred by the ENGINEER to mitigate the threat, in accordance with the ENGINEER'S prevailing fee schedule and expense reimbursement policy.

#### ARTICLE 8 - EXTENSION OF SERVICES

##### 8.1 Additional Work

In the event the ENGINEER, as requested by the OWNER, is to make investigations or reports on matters not covered by this AGREEMENT, or is to perform other services not included herein, additional compensation shall be paid the ENGINEER as is mutually agreed upon by and between the OWNER and the ENGINEER. Such services shall be incorporated into written amendments to this AGREEMENT, or into a new written AGREEMENT.

##### 8.2 Changes in Work

The OWNER, from time to time, may require changes or extensions in the Scope of Services to be performed hereunder. Such changes or extensions, including any increase or decrease in the amount of compensation, to be mutually agreed upon by and between the OWNER and the ENGINEER, shall be incorporated into written amendments to this AGREEMENT.

##### 8.3 Litigation Support Services

In the event the ENGINEER is to prepare for or appear in any litigation on behalf of the OWNER, additional compensation shall be paid the ENGINEER.

The OWNER agrees to compensate the ENGINEER for time spent and expenses incurred in preparation for and attendance at meetings and appearances, including depositions. This shall include appearances before the OWNER'S attorney and before the attorney of any other party to

## 4.C.

the litigation, in addition to all other support services as requested by the OWNER. Additional compensation shall be paid the ENGINEER as is mutually agreed upon by and between the OWNER and the ENGINEER. Such services shall be incorporated into written amendments to this AGREEMENT, or into a new written AGREEMENT.

### 8.4 Hazardous Materials Encountered

If, in the performance of the work, hazardous materials are encountered and are judged by the ENGINEER to be an imminent threat to on-site personnel and/or the general public, the ENGINEER shall inform the Local and State Emergency Personnel of the release. The OWNER agrees to compensate the ENGINEER for any time spent or expenses incurred by the ENGINEER to mitigate the threat, in accordance with the ENGINEER'S prevailing fee schedule and expense reimbursement policy. Such services shall be incorporated into written amendments to this AGREEMENT or into a new written AGREEMENT.

## ARTICLE 9 - OWNERSHIP AND USE OF DOCUMENTS

- 9.1 The OWNER shall retain ownership of the documents submitted to the OWNER by the ENGINEER pursuant to this AGREEMENT. However, such documents are not intended or represented to be suitable for reuse by the OWNER or others on extensions of the PROJECT or on any other PROJECT. Any reuse or adaptation by the OWNER without written verification by the ENGINEER shall be at the OWNER'S sole risk and without liability or legal exposure to the ENGINEER or to the ENGINEER'S independent sub-consultants, and the OWNER shall indemnify and hold harmless the ENGINEER and the ENGINEER'S sub-consultants from all claims, damages, losses and expenses, including reasonable attorneys' fees arising out of or resulting therefrom. Any verification or adaptation performed by the ENGINEER shall entitle the ENGINEER to further compensation at rates to be agreed upon by the OWNER and the ENGINEER.

## ARTICLE 10 – TERMINATION

- 10.1 The obligation to provide further services under this AGREEMENT may be terminated by either party upon thirty (30) days' written notice in the event of substantial failure by the other party to perform in accordance with the terms hereof through no fault of the terminating party.
- 10.2 If the PROJECT is suspended or abandoned in whole or in part for more than three (3) months, the ENGINEER shall be compensated for all services performed prior to receipt of written notice from the OWNER of such suspension or abandonment, together with other direct costs then due and all Termination Expenses as defined in Article 10.4. If the PROJECT is resumed after being suspended for more than three (3) months, the ENGINEER'S compensation shall be equitably adjusted.
- 10.3 In the event of termination by the OWNER under Article 10.1, the ENGINEER shall be paid for all unpaid services and unpaid other direct costs incurred to the date of receipt of written notice of termination, including sub-consultants, and for the services necessary to affect termination, in accordance with the provisions of Article 5 of this AGREEMENT.



- 10.4 In the event of termination by the ENGINEER under Article 10.1, or termination by the OWNER for the OWNER'S convenience, the ENGINEER shall be paid for all unpaid services and unpaid other direct costs incurred to the date of receipt of written notice of termination, including sub-consultants, for the services necessary to affect termination. Payment for services will be in accordance with the provisions of Article 5 of this AGREEMENT.

#### ARTICLE 11 - GENERAL PROVISIONS

##### 11.1 Precedence

The terms and conditions in this AGREEMENT shall take precedence over any inconsistent or contradictory provisions contained in any proposal, contract, purchase order, requisition, notice to proceed, or like document regarding the ENGINEER'S services.

##### 11.2 Severability

If any of the terms and conditions in this AGREEMENT shall be finally determined to be invalid or unenforceable in whole or part, the remaining provisions hereof shall remain in full force and effect, and be binding upon the parties hereto. The parties agree to reform this AGREEMENT to replace any such invalid or unenforceable provision with a valid enforceable provision that comes as close as possible to the intention of the stricken provision.

##### 11.3 Mediation

All claims, disputes or controversies arising between the OWNER and the ENGINEER shall be submitted to non-binding mediation prior to and as a condition precedent to the commencement of any litigation between those parties. The American Arbitration Association, or such other person or mediation service shall conduct the non-binding mediation as the parties mutually agree upon. The party seeking to initiate mediation shall do so by submitting a formal written request to the other party to this AGREEMENT and the American Arbitration Association or such other person or mediation service as the parties mutually agree upon. The costs of mediation shall be borne equally by the parties. All statements of any nature made in connection with the non-binding mediation shall be privileged and will be inadmissible in any subsequent court or other proceeding involving or relating to the same claim.

##### 11.4 Subrogation

The OWNER and the ENGINEER waive all rights against each other and against the contractors, consultants, agents and employees of the other for damages, but only to the extent covered by any property or other insurance in effect whether during or after the PROJECT. The OWNER and the ENGINEER shall each require similar waivers from their contractors, consultants and agents.

##### 11.5 Consequential Damages

Notwithstanding any other provision of this Agreement, and to the fullest extent permitted by law, neither the OWNER nor the ENGINEER, their respective officers, directors, partners, employees, contractors or subconsultants shall be liable to the other or shall make any claim for incidental,

## 4.C.

indirect or consequential damages arising out of or connected in any way to the Project or to this Agreement. This mutual waiver of consequential damages shall include, but is not limited to, loss of use, loss of profit, loss of business, loss of income, loss of reputation or any other consequential damages that either party may have incurred from any cause of action including negligence, strict liability, breach of contract and breach of strict or implied warranty. Both the OWNER and ENGINEER shall require similar waivers of consequential damages protecting all the entities or persons named herein in all contracts and subcontracts with others involved in the Project.

### 11.6 Sole Remedy

Notwithstanding anything to the contrary contained herein, OWNER and ENGINEER agree that their sole and exclusive claim, demand, suit, judgment or remedy against each other shall be asserted against each other's corporate entity and not against each other's shareholders, A/E's, directors, officers or employees.

### 11.7 Third Party Obligations

Nothing contained in this Agreement shall create a contractual relationship with or a cause of action in favor of a third party against either the OWNER or the ENGINEER.

### 11.8 Statute of Limitations

Causes of action between the parties to this Agreement pertaining to acts or failures to act shall be deemed to have accrued and the applicable statutes of limitations shall commence to run not later than either the date of Substantial Completion for acts or failures to act occurring prior to Substantial Completion or the date of issuance of the final Certificate for Payment for acts or failures to acts occurring after Substantial Completion. In no event shall such statutes of limitations commence to run any later than the date when the ENGINEER's services are substantially completed.

### 11.9 Engineer's Liability for Construction Contract Award Recommendations

In consideration of the ENGINEER'S performance of its obligation to review and evaluate the various bidders and bid submissions and to make recommendations to the OWNER regarding the award of the construction contract, the OWNER agrees to hold harmless the ENGINEER for all costs, expenses, damages and attorneys' fees which are incurred by the ENGINEER as a result of any claims, allegations, administrative or court proceedings, arising out of or relating to any bid protest or such other action taken by any person or entity with respect to the review and evaluation of the bidders and bid submissions and/or recommendations concerning the award of the construction contract. This paragraph shall not apply in circumstances in which the ENGINEER is finally adjudicated by a court to have actually engaged in intentional and willful conduct without any legitimate justification, privilege or immunity.

### 11.10 Limitation of Engineer's Responsibilities During Construction

The ENGINEER shall not be responsible for the acts or omissions of any Contractor(s), or of any subcontractor(s) or supplier(s), or any of Contractor(s)' or subcontractor(s)' or supplier(s)' agents



## 4.C.

or employees or any other persons (except ENGINEER's own employees and agents) at the site or otherwise furnishing or performing Contractor(s)' work.

### 11.11 Engineer Not Responsible for Accuracy of Contractor-Supplied Information Used in Record Drawings

The ENGINEER shall not be responsible for any errors in or omissions in the information provided by Contractor that is incorporated in the record drawings or other record documents. ENGINEER shall not check the Contractor's record drawings information unless included in the scope of the ENGINEER's services contained in Article 2, and then ENGINEER will only be responsible for checking what is not hidden behind walls, in the floor or roof slabs, etc.

### 11.12 Opinions of Probable Construction Cost

The ENGINEER makes opinions of probable costs using its best judgement as an experienced and qualified professional engineer generally familiar with the construction industry. ENGINEER has no control over the cost of labor, materials, equipment or services furnished by others, or the Contractor's methods of determining prices, or competitive bidding or market conditions or when the Project will be constructed. ENGINEER cannot and does not guarantee that Contractor's bids or actual construction costs will not vary from opinions of probable construction cost prepared by ENGINEER. If OWNER desires greater assurance as to probable construction cost, OWNER shall employ an independent cost estimator.

### 11.13 Changed Conditions

If concealed or unknown conditions that affect the performances of the services are encountered, that are not ordinarily found to exist or that differ materially from those generally recognized as inherent in the services of the character provided for under this AGREEMENT or which could not have reasonably been anticipated, notice by the observing party shall be promptly given to the other party and, if possible before the conditions are disturbed. If the ENGINEER makes the claim, ENGINEER's schedule and compensation shall be equitably adjusted to reflect additions that result from such changed conditions.

### 11.14 Force Majeure

If delays or failures of performance of the ENGINEER are caused by occurrences beyond the reasonable control of the ENGINEER, the ENGINEER shall not be in default of this AGREEMENT. Said occurrences shall include Acts of God or the public enemy; expropriation or confiscation; compliance with any other of any governmental authority; changes in law; act of war, rebellion, terrorism or sabotage or damage resulting therefrom; fires, floods, explosions, accidents, riots, strikes or other concerted acts of workmen, whether direct or indirect; delays in permitting; OWNER's failure to provide data in OWNER's possession or provide necessary comments in connection with any required reports prepared by the ENGINEER, or any other causes which are beyond the reasonable control of the ENGINEER. ENGINEER's scheduled completion date shall be adjusted to account for any force majeure delay and ENGINEER shall be compensated for all costs incurred in connection with or arising from a force majeure event or in the exercise of reasonable diligence to avoid or mitigate a force majeure event.

ARTICLE 12 – DISCLOSURE RIGHTS

- 12.1 OWNER agrees the ENGINEER has the authority to use its name as a client and a general description of the project as a reference for other prospective clients.

ARTICLE 13 – NON-DISCRIMINATION PROVISION

- 13.1 During the performance of this Contract, the ENGINEER, for himself, his assignees and successors in interest (hereinafter referred to as the "ENGINEER"), agrees as follows:

- (a) The ENGINEER will comply with the provisions of Chapter 151B, as amended, of the General Laws of Massachusetts relative to non-discrimination which are incorporated herein by reference and made a part of this Contract.
- (b) In the performance of work under this Contract, the ENGINEER shall not discriminate in employment practices or in the selection or retention of subcontractors or in the procurement of materials or rental of equipment on the grounds of race, color, religion, gender identity or gender expression, or national origin, or on the grounds of age or sex except when age or sex is a bona fide occupational qualification.

The ENGINEER will send to each labor union or representative of workers with which he has a collective bargaining agreement or other contract or understanding, a notice advising the said labor union or workers' representative of the ENGINEER's commitments under this section and shall post copies of such notice in conspicuous places available to employees and applicants for employment.

- (c) In all solicitations either by competitive bidding or negotiation made by the ENGINEER for work to be performed under a subcontract and for the procurement of materials and equipment, each potential subcontractor or supplier shall be notified in writing by the ENGINEER of the ENGINEER's obligations under this Contract relative to non-discrimination on grounds of race, color, religion, gender identity or gender expression, national origin, age or sex, and his obligations to pursue an affirmative course of action as required by paragraph (d).
- (d) The ENGINEER will pursue an affirmative course of action as required by affirmative action guidelines adopted by the Human Relations Commission in effect on the effective date of the contract, or when calls for proposals are made, whichever is sooner, which are herein incorporated by reference, attached hereto, and made a part of this contract and to the nature and size of his work force, to insure that applicants are sought and employed, and that employees are treated, during their employment, without regard to their race, color, gender identity or gender expression, national origin or ancestry, or religion. No changes in affirmative action guidelines hereinafter adopted by the Commission shall be effective with respect to contracts already in effect, without the express written consent of the ENGINEER.

## 4.C.

- (e) In the event the ENGINEER fails to comply with the foregoing non-discrimination provisions of this Contract, the contracting agency of the Town, upon advice and counsel of the Human Relations Commission, shall impose such contract sanctions as it may determine to be appropriate, including but not limited to: (1) withholding of payment due the ENGINEER under this contract until the ENGINEER complies, and/or (2) cancellation, termination or suspension of this Contract, in whole or in part.

For the purposes of this section the contracting agency of the Town shall accept as proof of noncompliance with the provisions of subsection (a), only final orders or decisions of the Massachusetts Commission Against Discrimination.

- (f) The provisions of this section shall be deemed supplementary to, and not in lieu of, or in substitution for, the provisions of Massachusetts Law relating to non-discrimination, and other applicable Federal, State or Town law, by-law, rule, regulation, and directive relative thereto. In the event of a conflict between the provisions of this section and, where inserted or incorporated in this contract, an applicable state or federal law, rule, regulation or directive, the conflicting provisions of the latter shall control.

### ARTICLE 14 – NOTICES

Any notice required under this Agreement will be in writing, addressed to the appropriate party at the address that appears below, and given personally, by registered or certified mail, return receipt requested, by facsimile, or by a nationally recognized overnight courier service. All notices shall be effective upon the date of receipt.

Notices shall be provided to:

Owner: Town of Brookline  
Name: Erin Chute Gallentine  
Title: Commissioner of Public Works  
Address:  
333 Washington Street  
4<sup>th</sup> Floor  
Brookline, MA 02445

Engineer: Weston & Sampson Engineers, Inc.  
Name: Eugene R. Bolinger  
Title: Vice President  
Address:  
85 Devonshire Street  
3<sup>rd</sup> Floor  
Boston, MA 02109

### ARTICLE 15 – CONTROLLING LAW

This Agreement is to be governed by the law of the Commonwealth of Massachusetts.

## 4.C.

IN WITNESS WHEREOF, the parties hereto have executed this AGREEMENT the day and year first above written.

ACCEPTED FOR THE TOWN

OF BROOKLINE, MA

WESTON & SAMPSON ENGINEERS, INC.

By Its SELECTBOARD

By: Eugene R. Bolinger

SCHOOL COMMITTEE

Eugene R. Bolinger, RLA  
Vice President

BUILDING COMMISSION

January 26, 2021

DATE

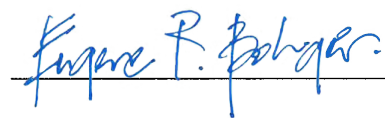
*Signature Page Attached*

DATE

This agreement is entered into as of the day and year first written above.

**Tax Compliance Certification**

Pursuant to M.G.L. c. 62C, §49A, I certify under the penalties of perjury that, to the best of my knowledge and belief, I am in compliance with all laws of the Commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting child support.

A handwritten signature in blue ink, reading "Eugene P. Bohyer", is written over a horizontal line.

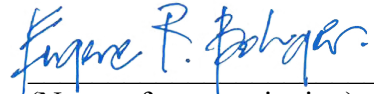
Signature of person submitting bid or proposal

Weston & Sampson Engineers, Inc.

Name of business

**CERTIFICATE OF NON-COLLUSION**

The undersigned certifies under penalties of perjury that this Agreement is in all respects bona fide, fair and made without collusion or fraud with any other person. As used in this paragraph the word "person" shall mean any natural person, joint venture, partnership, corporation or other business or legal entity.

  
\_\_\_\_\_  
(Name of person signing)

Weston & Sampson Engineers, Inc.  
(Company)

## APPROVAL OF OWNER

## SELECTBOARD

Date: \_\_\_\_\_

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## BUILDING COMMISSION

Date: \_\_\_\_\_

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## SCHOOL COMMITTEE

Date: \_\_\_\_\_

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## CERTIFICATION OF AVAILABLE FUNDS

Certification is herewith given that, in accordance with Mass Gen Laws CH. 44 paragraph 31 C, that an appropriation in the amount of the Contract Sum has been made and is available for compensation to the Engineer for the work described by the terms of this AGREEMENT.

By:   
OWNER Comptroller

Date: 2-8-21

By:   
OWNER Director of Purchasing

Date: 2/8/21

## APPROVED AS TO FORM:

By:   
OWNER Counsel

Date: 1/28/21

OWNER'S Massachusetts Sales and Use Tax Certificate Exemption Number #046-001-102

TOWN OF BROOKLINE  
333 Washington Street, Brookline, Massachusetts 02146

**PURCHASE ORDER CHANGE FORM**

INVOICE DATE: 11-Jan-21

TO:	Weston & Sampson 85 Devonshire Street, 3rd Floor Boston MA 02109
-----	--

Purchase Order Number  
**21919432**

Vendor Number  
**25022**

PAYMENT AMOUNT  
**\$96,000.00**

BUDGET \$300,000.00  
BALANCE \$96,000.00

FUND	ORGANIZATION	ACTIVITY	OBJECT
	2594C204		6C0007

FOR: Brookline Cypress Street Playground

Amendment	Date	
1	9/30/2020	Construction Phase Services

AMOUNT  
**\$96,000.00**

**BUILDING COMMISSION**

APPROVAL OF:

Janet Fierman, Chairman

George Cole

Kenneth Kaplan

Karen Breslawski

Nathan E. Peck

**SELECT BOARD**

APPROVAL OF:

Bernard W. Greene, Chairman

Nancy S. Heller

Heather Hamilton

Raul Fernandez

John VanScoyoc

**SCHOOL COMMITTEE**

APPROVAL OF:

Mary Ellen Norman, Assistant Superintendent For Administration and Finance


*Jan B. Rubin*





# TOWN OF BROOKLINE

*Massachusetts*

## DEPARTMENT OF PUBLIC WORKS

Engineering & Transportation Division

*Erin Chute Gallentine*  
Commissioner

### INTEROFFICE MEMORANDUM

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To: SELECT BOARD  
TOWN OF BROOKLINE

From: ERIN GALLENTINE  
COMMISSIONER OF PUBLIC WORKS

Date: FEBRUARY 16, 2021

Re: **PW/19-15 CARLTON STREET FOOTBRIDGE REHABILITATION**  
**Amendment #1 Stantec Lighting/Electrical Construction Phase Services**

Cc: BILL SMITH, Project Coordinator, DPW-Engineering & Transportation

Attached herewith for the Select Board's review and signature authorization is Amendment #1 to contract PW/19-15, in the amount of \$14,800.00, with Stantec Consulting Services, Inc., for Construction Phase Services (CPS) specific to Lighting and Electrical Engineering on the Carlton Street Footbridge Rehabilitation project. Funding shall be drawn from Acct # 4997C166 6H0021, a bonding appropriation for footbridge engineering and construction costs borne by the Town.

The proposed scope of work within the CPS amendment includes the following tasks: 1) shop drawing review; 2) Request for Information (RFI) responses; 3) site visits/job meetings; 4) inspections; and 5) record drawings.

Funding will be encumbered from the existing footbridge engineering/construction bond authorization account. While MassDOT is committed to fully fund construction costs for the Carlton Street Footbridge Rehabilitation, with a current appropriation of \$3,955,053.50 for their active contract with Aetna Bridge Company, the Town of Brookline, as project proponent, is responsible for providing consulting engineering services through project completion, anticipated in the Spring, 2022.

## Town Of Brookline

## Contract Amendment Approval Form

Department: DPW Engineering/TransDate/Vote: 02/16/2021 Select Board VoteContract #: PW/09-15Title: Carlton Street Footbridge – Lighting & Electrical Engineering ServicesVendor #: 38491Vendor Name: Stantec Consulting Services, Inc.Purchase Order #: pending voteAmendment: Amendment #1 – Construction Phase ServicesValue (\$) of Amendment: \$14,800.00

## Purpose of Amendment:

## Description:

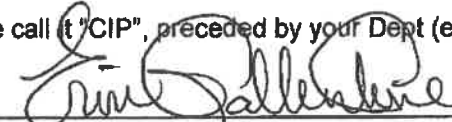
Stantec Consulting Services' Construction Phase Services (CPS) contract Amendment#1 provides requisite electrical engineering and lighting fabrication/installation support for new lighting fixtures at both the Riverway Park and Carlton/Colchester approaches to the footbridge, as well as low level lighting at the decking and stairs of the historic footbridge structure. Tasks within this CPS amendment include: 1) shop drawing review; 2) Request for Information (RFI) responses; 3) site visits/job meetings; 4) inspections; and 5) record drawings. Funding will be encumbered from the existing footbridge construction bond authorization account. While MassDOT is committed to fully fund construction costs for the Carlton Street Footbridge Rehabilitation, with a current appropriation of \$3,955,053.50 for the Aetna Bridge Company contract, the Town of Brookline, as project proponent, is responsible for providing consulting engineering services through project completion.

## Coding:

Org#	Org Name*	Acct #	Acct Name	Amount
<u>4997C166</u>	<u>DPW CIP</u>	<u>6H0021</u>	<u>Bond Issue</u>	<u>\$ 14,800.00</u>

\*For "K" or "C" accounts, please call it "CIP", preceded by your Dept (e.g. 4909K011 would be "DPW CIP")

Department Head:

  
Erin Chute Gallentine,  
Commissioner of Public Works

Date:

2/10/21

## Comptroller Approval of Coding and Funds Availability

Funds Available/Codes Correct:

  
Comptroller

Date Approved

## Purchasing Approval

Complies with Appropriate Procurement Law:  
MGL ch 149, ch 30 30M, or ch 30B

  
Purchasing

Date Approved



**Stantec Consulting Services Inc.**  
5 Burlington Woods Drive Suite 210, Burlington MA 01803-4542

February 11, 2021  
File: Stantec: 191507001  
Brookline: Contract PW/19-15

**Attention:**

**William L. Smith, RA, CS**  
Town of Brookline  
DPW – Engineering & Transportation  
333 Washington St.  
Brookline, MA 02445

**Reference: Carlton Street Footbridge Lighting - Construction Phase Services, Brookline MA**

Dear Bill,

Thank you for the opportunity to amend the Carlton Street Footbridge contract (contract PW/19-15) to include Construction Phase Services. The following is our anticipated scope of services and level of effort based upon conversations and the project bid documents.

## **Amended Project Scope:**

### **Electrical Services**

#### **Construction Phase**

1. Review shop drawings for the lighting system including luminaires, driver vault, pole, base, control cabinet, handholes, junction boxes, conduit, wire, ground rod, fuse holders and splices.
2. Answer RFI's.
3. Provide two site visits during construction followed by trip memorandum for each visit and updates to record drawings.
4. Attend two on-site (or Town Hall) job meetings.
5. Provide one site visit for final test and checkout including at least one nighttime site visit followed by trip memorandum for each visit.
6. Provide record drawings capturing field location adjustments.

**Design with community in mind**



February 11, 2021

Page 2 of 2

**Reference: Carlton Street Footbridge Lighting - Construction Phase Services, Brookline MA**

### Assumptions and Clarifications:

1. We have included 8 man-hours for RFI's as a task item, however, due to the nature of the underground construction, we will need to monitor this activity and evaluate it as the project proceeds.
2. No allowance has been made for attendance at routine construction meetings.

### Schedule:

- Our proposal is based upon the following expected milestone schedule:
- Notice to proceed beginning on or about March 1, 2021
- One-year construction period starting Spring 2021 and ending Spring 2022.

It is our intent to bill monthly as the work is performed.

Compensation – Stantec will perform the above scope of work for a lump sum fee of \$14,800.

Our work will be limited to the scope of work defined in this proposal and estimated in the attached man-hour spreadsheet. Any additional work requested by the Town of Brookline will be billed at the person's hourly rate indicated in the attached fee worksheet. No out of scope work will be paid unless written approval is provided in advance of the work beginning.

I am available to discuss this proposal at any time with you and can be reached at (781) 221-1171.

Regards,

### STANTEC CONSULTING SERVICES INC.

**Moseley,  
Frederick**

Digitally signed by Moseley,  
Frederick  
Date: 2021.02.11 10:19:09  
-05'00'

Fred Moseley  
Principle  
Phone: (781) 221-1131  
Frederick.Moseley@stantec.com

*Dan Hallahan*  
Digitally signed by Daniel Hallahan  
DN: cn=Dan Hallahan, email=daniel.hallahan@stantec.com,  
ou=Stantec Inc., o=Stantec Inc., ou=Daniel Hallahan,  
c=US, email=daniel.hallahan@stantec.com  
I agree to the terms defined by the placement  
of my signature on this document  
Contact info: daniel.hallahan@stantec.com  
Date: 2021.02.11 05:22:51 -05'00'

Daniel Hallahan, P.E.  
Senior Electrical Engineer  
Phone: 781-221-1171  
Daniel.Hallahan@Stantec.com

# Carlton St Footbridge - Construction Phase Services

Brookline MA

Date: 02/11/2021

Description	Principal	Project Manager	Structural Engineer	Sr. Electrical Engineer	CAD/Revit Coordinator	Total
Task 1	2	4	2	76	0	84
Construction Phase Services						
Labor	\$476.00	\$696.00	\$348.00	\$13,224.00	\$0.00	\$14,744.00
Task 2	0	0	0	0	0	0
N/A						
Labor	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Task 3	0	0	0	0	0	0
N/A						
Labor	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Task 4	0	0	0	0	0	0
N/A						
Labor	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Task 5	0	0	0	0	0	0
N/A						
Labor	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total Hours	2	4	2	76	0	84
Labor Rate	\$238.00	\$174.00	\$174.00	\$174.00	\$160.00	
Total Labor	\$476.00	\$696.00	\$348.00	\$13,224.00	\$0.00	\$14,744.00
<b>EXPENSES</b>						\$36.96
<b>Total Cost</b>						<b>\$14,800.00</b>

# Carlton St Footbridge - Construction Phase Services

Brookline MA

Hours By Task

Date: 02/11/2021

Task	Principal	Project Manager	Structural Engineer	Sr. Electrical Engineer	CAD/Revit Coordinator	Total
<b>Task 1 Construction Phase Services</b>						
						0
1.01 Shop Drawing review						0
1.02 Luminares				4		4
1.03 Low Voltage Driver Vault				4		4
1.04 Lighting calculation review				2		2
1.05 Pole			2	4		6
1.06 Lighting Cabinet				8		8
1.07 Handhole Frame and Cover				2		2
1.08 Handholes				2		2
1.09 Junction Box				2		2
1.1 Pole base				2		2
1.11 Conduit				1		1
1.12 Wire				1		1
1.13 Ground rods				1		1
1.14 Fuse Holders / Splices				1		1
1.15 Site visit during construction - 2 days: 4hr inspt & 2hr report 2hr rec dwg update				16		16
1.16 Attend Pre-Con meeting and one onsite meetings - 4 hours per meeting				8		8
1.17 Final Test and Checkout - One night visit & One day visit: 2hr per inspt & 2hr report;				6		6
1.18 Record drawings (4 hours per plan drawing)				4		4
1.19 RFIs				8		8
1.2 Management and QA (1 hour per Season)	2	4				6
						0
<b>TOTAL</b>	<b>2</b>	<b>4</b>	<b>2</b>	<b>76</b>	<b>0</b>	<b>84</b>
<b>Task 2 N/A</b>						
						0
						0
<b>TOTAL</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>Task 3 N/A</b>						
						0
						0
<b>TOTAL</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>Task 4 N/A</b>						
						0
						0
<b>TOTAL</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>Task 5 N/A</b>						
						0
						0
<b>TOTAL</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>TOTAL PROJECT HOURS</b>	<b>2</b>	<b>4</b>	<b>2</b>	<b>76</b>	<b>0</b>	<b>84</b>



Carlton St Footbridge - Construction Phase Services						
Brookline MA						
Stantec Burlington Buildings Level of Effort					Date 02/11/21	
Task						Totals
Reproduction & Coping	# of Sheet	\$/Sheet		\$/Set	# of sets	
Drawings						
FULL-SIZE	0	\$ 0.72			0	\$ -
HALF-SIZE or 11x17	0	\$ 0.24			0	\$ -
Specifications						
COST	0	\$ 0.06			0	\$ -
General Printing Allowance						
PRINTING ALLOWANCE	\$ -					\$ -
					Sub Total:	\$ -
Postage/Mailing						
USPS	\$ -					\$ -
UPS	\$ -					\$ -
FedEx	\$ -					\$ -
					Sub Total:	\$ -
Travel						
	# of Trips	miles	Cost/mile	Cost		
Automobile mileage	6	10	0.56			\$ 33.60
Parking	0			\$ -		\$ -
Airplane Fare				\$ -		\$ -
Hotel				\$ -		\$ -
Tolls				\$ -		\$ -
Public Transportation				\$ -		\$ -
Other means of Travel				\$ -		\$ -
					Sub Total:	\$ 33.60
Meals						
	# of Meals	Cost/ Meal	# of Days	Cost per diem		
Breakfast	0	\$ -	0	\$ -		\$ -
Lunch	0	\$ -	0	\$ -		\$ -
Dinner	0	\$ -	0	\$ -		\$ -
					Sub Total:	\$ -
Vendor Cost						
List name of Vendor	List Service Provided					\$ -
List name of Vendor	List Service Provided					\$ -
List name of Vendor	List Service Provided					\$ -
List name of Vendor	List Service Provided					\$ -
					Sub Total:	\$ -
Billing Questions						
Questions	Answer			Non-Billable	Billable Total	
Is Reproduction & Coping billable?	No			\$0.00		
Is Postage/Mailing billable?	Yes				\$0.00	
Is Travel billable?	Yes				\$33.60	
Are Meals billable?	Yes				\$0.00	
Are Vendors billable?	No			\$0.00		
Grand Total - Non-Billable						\$0.00
Grand Total - Billable						\$33.60

## 4.D.

IN WITNESS WHEREOF, the parties hereto have made and executed this Agreement (**Town of Brookline, Department of Public Works, Amendment #1 to Contract PW/19-15**) with **Stantec Consulting Services, Inc.**, by their duly authorized representatives as of the **16<sup>th</sup> day of February, 2021**:

OWNER:  
**Town of Brookline  
Select Board**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

APPROVED AS TO FORM:  
**Town Counsel**

\_\_\_\_\_  
CERTIFIED in accordance with  
Chapter 44, Section 31C:  
**Comptroller**

\_\_\_\_\_

Date: February 16, 2021

CONSULTING ENGINEER:  
**Stantec Consulting Services, Inc.**

Moseley,  
Frederick

Digitally signed by Moseley,  
Frederick  
Date: 2021.02.11 10:20:11  
+05'00'

Fred Moseley  
Principle



**CARLTON STREET FOOTBRIDGE REHABILITATION**  
**Addendum to Construction Phase Services Amendment#1**  
**to Contract PW/19-15**  
**with Stantec Consulting Services, Inc.**

Article 4.4 of the Town of Brookline General By-Laws

By signing below, Consultant, Stantec Consulting Services, Inc., hereby agrees to comply with the provisions of Article 4.4 of the Town's General By-laws, *Fair Employment Practices with Regard to Contracts*, a copy of which is incorporated herein by reference, with respect to the foregoing Contract.

Moseley,  
Frederick  
Stantec Consulting Services, Inc.  
Stantec Consulting Services, Inc.

Digitally signed by Moseley,  
Frederick  
Date: 2021.02.10 16:12:52  
-05'00'

Article 4.5 of the Town of Brookline General By-Laws

Pursuant to Section 4.5.2 of the General By-laws of the Town of Brookline, Consultant, Stantec Engineering Services, Inc., hereby certifies under the pains and penalties of perjury that it does not discriminate against any individual because of the race, color, religious creed, national origin, sex, gender identity or gender expression, sexual orientation, which shall not include persons whose sexual orientation involves minor children as the sex object, age or ancestry of the individual.

Signed under the pains of penalties of perjury on this 11<sup>th</sup> day of February, 2021.

Moseley,  
Frederick  
Stantec Consulting Services, Inc.  
Stantec Consulting Services, Inc.

Digitally signed by Moseley,  
Frederick  
Date: 2021.02.10 16:15:01  
-05'00'

## 4.D.

### CERTIFICATE OF NON-COLLUSION

The undersigned certifies under penalties of perjury that this bid is in all respects bona fide, fair and made without collusion or fraud with any other person. As used in this paragraph the word "person" shall mean any natural person, joint venture, partnership, corporation or other business or legal entity.

Moseley,  
Frederick

Digitally signed by Moseley,  
Frederick  
Date: 2021.02.10 16:14:23 -05'00'

\_\_\_\_\_  
(Name of person signing bid)

**Stantec Consulting Services, Inc.**

\_\_\_\_\_  
(Company)

**Tax Compliance Certification**

Pursuant to M.G.L. c. 62C, §49A, I certify under the penalties of perjury that, to the best of my knowledge and belief, I am in compliance with all laws of the Commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting child support.

Moseley,  
Frederick

Digitally signed by Moseley,  
Frederick  
Date: 2021.02.10 16:13:46  
-05'00'

\_\_\_\_\_  
Signature of person submitting bid or proposal

Stantec Consulting Services, Inc.

Name of business



# CERTIFICATE OF LIABILITY INSURANCE

5/1/2021

DATE (MM/DD/YYYY)

4/10/2020

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Lockton Companies 444 W. 47th Street, Suite 900 Kansas City MO 64112-1906 (816) 960-9000	CONTACT NAME:	
	PHONE (A/C, No, Ext):	FAX (A/C, No):
INSURED 1415077 STANTEC CONSULTING SERVICES INC. 370 INTERLOCKEN BOULEVARD, SUITE 300 BROOMFIELD CO 80021-8012	E-MAIL ADDRESS:	
	INSURER(S) AFFORDING COVERAGE	
	INSURER A : Berkshire Hathaway Specialty Insurance Company	
	INSURER B : Travelers Property Casualty Co of America	
	INSURER C :	
	INSURER D :	
INSURER E :		
INSURER F :		

## COVERAGES

CERTIFICATE NUMBER: 15674132

REVISION NUMBER: XXXXXXXX

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> CONTRACTUAL/CROSS <input checked="" type="checkbox"/> XCU COVERED GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PRO-JECT <input checked="" type="checkbox"/> LOC OTHER:	Y	N	47-GLO-307584	5/1/2020	5/1/2021	EACH OCCURRENCE \$ 2,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000 MED EXP (Any one person) \$ 25,000 PERSONAL & ADV INJURY \$ 2,000,000 GENERAL AGGREGATE \$ 4,000,000 PRODUCTS - COM/PROP AGG \$ 2,000,000 \$
B B B	AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY <input type="checkbox"/> OTHER:	N	N	TC2J-CAP-8E086819 (AOS) TT-BAP-8E086820 TC2J-CAP-8E087017 (NJ)	5/1/2020 5/1/2020 5/1/2020	5/1/2021 5/1/2021 5/1/2021	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ XXXXXXXX BODILY INJURY (Per accident) \$ XXXXXXXX PROPERTY DAMAGE (Per accident) \$ XXXXXXXX \$ XXXXXXXX
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> DED <input type="checkbox"/> RETENTION \$	N	N	47-UMO-307585	5/1/2020	5/1/2021	EACH OCCURRENCE \$ 5,000,000 AGGREGATE \$ 5,000,000 \$ XXXXXXXX
B B B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N N	N/A	UB-3P635310 (AOS) UB-3P533004 (MA, WI) EXCEPT FOR OH ND WA WY	5/1/2020 5/1/2020	5/1/2021 5/1/2021	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

RE: STANTEC PROJECT #691570; CLIENT PROJECT 88246 - CARLTON STREET FOOTBRIDGE LIGHTING AND ELECTRICAL SERVICES. TOWN OF BROOKLINE IS AN ADDITIONAL INSURED AS RESPECTS TO GENERAL LIABILITY IF REQUIRED BY WRITTEN CONTRACT.

## CERTIFICATE HOLDER

## CANCELLATION

15674132 TOWN OF BROOKLINE 333 WASHINGTON STREET BROOKLINE MA 02445	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE 
--	---

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## **Alternate Manager**

Applicant: PCTERRACE LLC  
d/b/a: Noah's Kitchen  
License Type: All Kinds Common Victualler  
Location: 18 Harvard Street, Brookline, MA 02445

### **Application Details:**

Question of approving the applications for Alternate Manager Xuan Jiang for PCTERRACE LLC d/b/a Noah's Kitchen at 18 Harvard Street.

### **Report (Attached):**

**Police Department (Approved)**

## Checklist for Alternate Manager



- ☒ Alternate Manager Application
  - ☒ License Interview Form
  - ☒ CORI release form
  - ☒ Three letters of reference
  - ☒ Vote of Corporation
    - ☐ or letter from manager of record
  - ☐ IN-PERSON class for the safe service of alcohol certification
    - ☒ **On-line class will be accepted during the Covid-19 pandemic only**
  - ☒ Crowd Manager Certification from the Massachusetts Department of Fire Services (Only if there is a bar)
  - ☒ Valid Identification (State issued License, Passport, etc.)
- 
- ☒ Report from Brookline Police Chief



MARK P. MORGAN  
ACTING CHIEF OF POLICE

## BROOKLINE POLICE DEPARTMENT

*Brookline, Massachusetts*

TO: Chief Mark P. Morgan

FROM: Lt. Michael P. Murphy #31

DATE: 1 February 2021

RE: PC TERRACE, LLC d/b/a Noah's Kitchen: New Alternate Manager— 18 Harvard Street

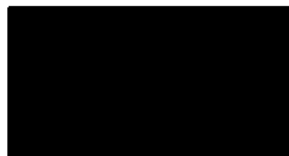
Sir,

PC TERRACE, LLC d/b/a Noah's Kitchen, who has a Section 12 license to Expose, Keep for Sale and to Sell All Kinds of Alcoholic Beverage, is requesting approval of a new Alternate Manager. The applicant, Mr. Xuan JIANG, is also a part owner of the restaurant.

Members of the LLC, or those with a financial interest in the business, Manager of Record and Alternate Manager:

Bin Chen – 33.4% Owner, LLC Manager, Manager of Record  
Jiang Song – 33.3% Owner, LLC Manager, Alternate Manager

Xuan JIANG– 33.3% Owner, LLC Manager: Request as New Alternate Manager Position



PC TERRACE, LLC is requesting the Board approve their application for Mr. Xuan JIANG to be named as an Alternate Manager. Mr. JIANG has had a career as a consultant and as a chef since 2007. He is the graduate of the Sichuan Tourism University in China. According to the application Mr. JIANG will be on site 20 hours per week. He has successfully completed his certification in the safe service of alcohol in an online class and a copy of that certificate was submitted. Mr. JIANG is also a certified Crowd Manager and a copy of this certification was also submitted. Three letters of recommendation were also submitted on his behalf. Mr. JIANG has never been an alternate manager of record of a license to sell alcoholic beverages that has been suspended, revoked or cancelled.

Mr. JIANG has a financial interest in this company and has previously submitted to the Brookline Police a complete set of fingerprints for the purpose of conducting a criminal background check. At this time



Public Safety Building, 350 Washington Street, Brookline, Massachusetts 02445  
Telephone (617) 730-2249 ♦ Facsimile (617) 730-8454

## 4.E.

in-person fingerprinting has been suspended by the Brookline Police Department. When future results are returned, any negative or disqualifying information will be submitted to the Board. Queries were conducted of other applicable law enforcement databases and no negative information was found on Mr. JIANG.

A meeting, telephone or Zoom will be held with Mr. JIANG to discuss the Town of Brookline's Sale of Alcoholic Beverages Regulations and what to expect during an administrative inspection. He was sent a copy of the Town regulations. As part of our discussion of the Alcoholic Beverages Regulations, we will discuss the need for either the Manager of Record or Alternate Manager is on site at all times.

I do not find any reason to deny this application.

Respectfully submitted,  
Lt. Michael P. Murphy #31



Public Safety Building, 350 Washington Street, Brookline, Massachusetts 02445  
Telephone (617) 730-2249 ♦ Facsimile (617) 730-8454



TOWN OF BROOKLINE  
ALTERNATE MANAGER'S APPLICATION

ALL PROPOSED MANAGERS ARE REQUIRED TO COMPLETE A PERSONAL INFORMATION FORM (ATTACHED) AND  
 SUBMIT A COPY OF THE CORPORATION VOTE AUTHORIZING THIS ACTION AND ALTERNATE MANAGER.

**1. LICENSEE INFORMATION:**

Legal Name of Licensee: PCTERRACE LLC Business Name (dba): NOAH'S KITCHEN  
 Address: 18 HARVARD STREET  
 City/Town: BROOKLINE State: MA Zip: 02445  
 ABCC License Number: 05351-RS-0148 Phone Number of Premises: 6173835848  
 (if existing licensee)

**2. MANAGER INFORMATION:**

A. Name: XUAN JIANG B. Cell Phone Number: [REDACTED]  
 C. List the number of hours per week you will spend on the licensed premises: 40

**3. CITIZENSHIP INFORMATION:**

A. Are you a U.S. Citizen: Yes ☐ No ☒ B. Date of Naturalization: [REDACTED]  
 C. Court of Naturalization: [REDACTED]

(Submit proof of citizenship and/or Naturalization such as Voter's Certificate, Birth Certificate or Naturalization Papers)

**4. BACKGROUND INFORMATION:**

A. Do you now, or have you ever, held any direct or indirect, beneficial or financial interest  
 in a license to sell alcoholic beverages? Yes ☐ No ☒  
 If yes, please describe: [REDACTED]  
 B. Have you ever been the Manager of Record of a license to sell alcoholic beverages that  
 Have been suspended, revoked or cancelled? Yes ☐ No ☒  
 If yes, please describe: [REDACTED]  
 C. Have you ever been the Manager of record of a license that was issued by this Commission? Yes ☐ No ☒  
 If yes, please describe: [REDACTED]  
 D. Please list your employment for the past ten years (Date, Position, Employer, Address, and Telephone):  
04/2019-NOW:NOAH'S KITCHEN, MAIN CHEF AND OWNER, 18 HARVARD STREET, BROOKLINE, MA 02445  
12/2017-07/2018:ALLEY41, MAIN CHEF, 41ST AVE, QUEENS, NY 11355  
07/2018-09/2008:LEADER CONSULTANT, CHENGDU, CHINA

I hereby swear under the pains and penalties of perjury that the information I have provided in this application is true and accurate:

Signature XUAN JIANG

Digitally signed by XUAN JIANG  
 DN: cn=XUAN JIANG, o=PCTERRACE LLC, ou=REFERENCE,  
 email=INFO@PCTERRACE.COM, c=US  
 Date: 2021.01.19 15:25:41 -0500

Date 01/19/2021

LICENSE INTERVIEW FORMTYPE OF LICENSE APPLYING FOR: LIQUORNAME: XUAN JIANGADDRESS: [REDACTED]EMAIL ADDRESS: BROOKLINE, MA 02445PHONE #: PCTERRACE LLC

PLACE OF BIRTH: \_\_\_\_\_

FATHER'S NAME: NOT MOTHER'S MAIDEN NAME: CHEN, WEIARE YOU A CITIZEN? YES ☐ NO ☒ ALIEN CARD # [REDACTED]ARE YOU A VETERAN: YES ☐ NO ☐

## RESIDENCES FOR LAST FIVE YEARS

DATE: 8/2020-NOW LOCATION: [REDACTED] MA 02481DATE: 08/2020-06/2018 LOCATION: [REDACTED] MA 02481DATE: 12/2017-06/2018 LOCATION: [REDACTED] NY11364DATE: 06/2018-01/2014 LOCATION: SHENXIANSU, CHENGDU, CHINA

DATE: \_\_\_\_\_ LOCATION: \_\_\_\_\_

**EDUCATION**

**DATE:** 09/1990-07/1994      **LOCATION:** SICHUAN TOURISM UNIVERSITY

**DATE:** \_\_\_\_\_ **LOCATION:** \_\_\_\_\_

**DATE:** \_\_\_\_\_ **LOCATION:** \_\_\_\_\_

**DATE:** \_\_\_\_\_ **LOCATION:** \_\_\_\_\_

**EMPLOYMENT HISTORY**

**DATE:** 04/2019-NOW      **LOCATION:** BROOKLINE      **POSITION** CHEF

**DATE:** 12/07-06/08      **LOCATION:** NEW YORK      **POSITION** CHEF

**DATE:** 09/94-06/08      **LOCATION:** SICHUAN CHENGDI      **POSITION** CONSULTANT

**DATE:** \_\_\_\_\_ **LOCATION:** \_\_\_\_\_ **POSITION** \_\_\_\_\_

**DATE:** \_\_\_\_\_ **LOCATION:** \_\_\_\_\_ **POSITION** \_\_\_\_\_

**SIGNATURE:** **XUAN JIANG** Digitally signed by XUAN JIANG  
DN: cn=XUAN JIANG, o=PCTERRACE  
LLC, ou=PCTERRACE,  
email=INFO@NOAHS.KITCHEN, c=US  
Date: 2021.01.19 15:26:40 -05'00' **DATE:** 01/19/2021

**(PLEASE SUBMIT THREE CHARACTER REFERENCES WITH APPLICATION)**



VOTE OF CORPORATION

DATE: 01/10/2021

AT A MEETING OF THE BOARD OF DIRECTORS OF BIN CHEN AND XUAN JIANG

HELD AT: 18 HARVARD STREET ON: BROOKLINE, MA 02445

IT WAS DULY VOTED THAT THE CORPORATION APPLY TO THE LICENSING BOARD FOR THE  
TOWN OF BROOKLINE FOR A  
LIQUOR LICENSE

(TYPE OF LICENSE)

FOR THE YEAR 2021 TO BE EXERCISED ON THE PREMISES LOCATED AT  
18 HARVARD STREET, BROOKLINE, MA 02445

VOTED: TO AUTHORIZE XUAN JIANG (ALTERNATE MANAGER) TO  
SIGN

THE APPLICATION FOR THE LICENSES IN THE NAME OF PCTERRACE LLC

AND TO EXECUTE ON ITS  
BEHALF ANY NECESSARY PAPERS, AND TO DO ALL THINGS REQUIRED RELATIVE TO THE  
GRANTING OF THE LICENSE.

THIS CORPORATION HAS NOT BEEN RESOLVED.

A TRUE COPY

ATTEST: \_\_\_\_\_  
CLERK

**APPENDIX A - CORI Acknowledgment Form**

I am an: (please check one)

Applicant - Position: ALTERNATE MANAGERDepartment/License: LIQUOR

Volunteer - Position: \_\_\_\_\_

Department: \_\_\_\_\_



Employee - Position: \_\_\_\_\_

Department: \_\_\_\_\_



Contractor - Company Name: \_\_\_\_\_

The Town of Brookline is registered under the provisions of M.G.L. c. 6, §172 to receive CORI for the purpose of screening current and otherwise qualified prospective employees, subcontractors, volunteers, license applicants, current licenses, and applicants for the rental or lease of housing. As the prospective or current employee, subcontractor, volunteer, license applicant, current licensee, or applicant for the rental or lease of housing, I understand that a CORI check will be submitted for my personal information to the DCJIS (and in the case of certain license applicants subject to fingerprint-based background checks, to the FBI). I hereby acknowledge and provide permission to The Town of Brookline to submit a CORI check for my information. This authorization is valid for one year from the date of my signature. I may withdraw this authorization at any time by providing The Town of Brookline with written notice of my intent to withdraw consent to a CORI check. For employment, volunteer, and licensing purposes only: The Town of Brookline may conduct subsequent CORI checks within one year of the date this Form was signed by me provided, however, that The Town of Brookline must first provide me with written notice of this check 72 hours in advance. By signing below, I provide my consent to a CORI check and acknowledge that the information provided on this Acknowledgment Form is true and accurate.

XUAN JIANG
Digitally signed by XUAN JIANG  
DN: cn=XUAN JIANG, o=COMMONWEALTH OF MASSACHUSETTS, email=XIJIAN@BROOKLINE.MA.GOV, c=US  
Date: 2021.03.19 15:27:36 -0500
01/19/2021

Applicant/Employee/Volunteer/Contractor Signature

Today's Date

**Applicant/Volunteer/Employee/Contractor Information (Please Print)**Last Name: JIANGFirst Name: XUAN

MI: \_\_\_\_\_

Current Address: \_\_\_\_\_ MA 02481

Former Address(es): \_\_\_\_\_ MA 02481

Maiden Name or Alias (If Applicable): \_\_\_\_\_ Place of Birth: SICHUAN CHIAN

Date of Birth: \_\_\_\_\_ Last 6 digits of Social Security Number: \_\_\_\_\_

Sex: M Height: 5 ft. 7 in. Race: ASIAN Eye Color: BROWN

State Driver's License Number (Include State): \_\_\_\_\_ ID Theft Index PIN\*: \_\_\_\_\_

List any other name(s) or dates of birth that appear in DCJIS's database: \_\_\_\_\_

Mother's Full Maiden Name: CHEN Father's Name: SHICHENG JIANG

\*The Identify Theft Index PIN Number is not required and only for those applicants who have been issued an Identity Theft Index PIN Number by the DCJIS. Certified agencies are required to provide all applicants the opportunity to include this information to ensure the Accuracy of the CORI request process.

**\*\*\*For Official Use Only\*\*\***

I certify that the foregoing person was identified in conformity with Town Policy using the following form of acceptable government-issued identification: (List ID Type)

Signature of CORI-Authorized Employee: \_\_\_\_\_ Date: \_\_\_\_\_

Name and Position of CORI-Authorized Employee: \_\_\_\_\_

# Certificate of Completion

This Certificate of Completion of

TIPS for On Premise

for coursework completed on

7/13/2019

(Date of Course & Exam)

provided by Barserv Unlimited Inc. is hereby granted to

JIANGLIAN

(Participant's Full Name)

Test ID#

6609247

R. Hart

Robert Hart

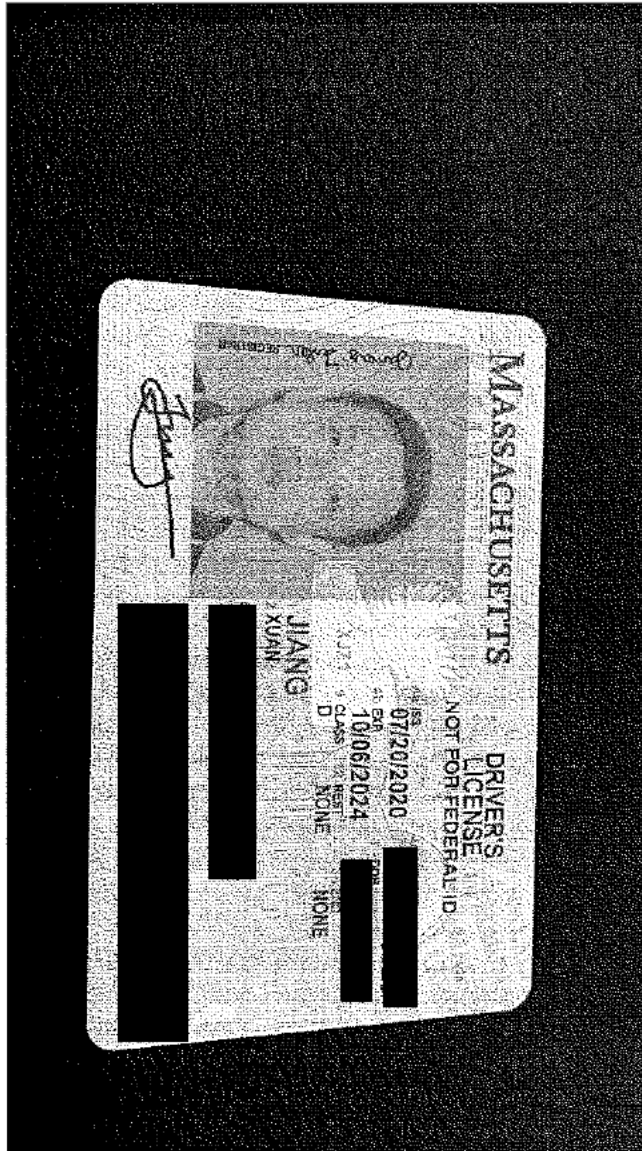
Certified TIPS Trainer# 11233

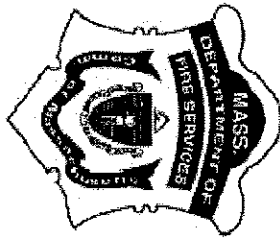
HCI

HEALTH COMMUNICATIONS, INC.

This document is not proof of TIPS certification. It signifies only that you have completed the course. Valid certification documents will be forwarded to you.

TIPS





*Commonwealth of Massachusetts*  
*Executive Office of Public Safety and Security*  
*Department of Fire Services*  
*Office of the State Fire Marshal*

**Certificate of Completion**

*This certifies that*

Jiang Xuan

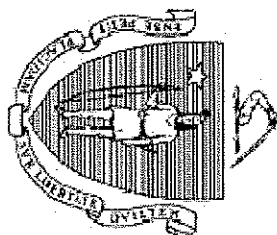
*Successfully completed the Crowd Manager Training Program*  
*In accordance with 527 CMR 1.00:20.1.5.6 - Designation of a Crowd Manager*

Date issued: January 20, 2021

Expires: January 20, 2024

Certificate #: ZGIFWXXVRvnc8BM

**Peter Ostroskey**  
 State Fire Marshal





January 20, 2020

To Town of Brookline, Board of Select-People

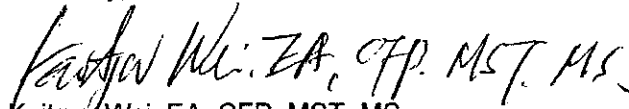
To whom it may concern:

My name is Kaitzev Wei, President of Financial & Taxation Services Inc. Mr. Xuan Jiang has been my client for numerous years, during which I have worked on his restaurant business, Pcterrace, LLC. Mr. Jiang has extensive restaurant expertise and business acumen to successfully manage his new restaurant, Noah's Kitchen.

Mr. Jiang has no communication issue. I have no doubt he would be capable of handling customers and employees professionally. Mr. Jiang's business ethic, hard-working nature, and passion for servicing others will suit him well for the long-term success of his business.

We are very proud that we will continue act as his tax accountant.

Sincerely,

A handwritten signature in black ink, appearing to read "Kaitzev Wei: EA, CFP, MST, MS".

Kaitzev Wei, EA, CFP, MST, MS

617-630-1602 (o)

617-796-0853 (fax)

[www.ftsicpa.com](http://www.ftsicpa.com)

January 20, 2021

To Town of Brookline, Board of Select-People

To whom it may concern:

It is my pleasure to provide the letter of recommendation for Xuan Jiang as a restaurant owner and alternate manager for Noah's Kitchen.

I knew Mr Jiang from Mass Restaurant Association. Mr. Jiang has extensive experience in restaurant business. He is so passionate to bring modern Asian cuisine experience to greater Boston community. I had great experience at his restaurant.

Noah's Kitchen already had a strong starting. I am confident that the restaurant will bring more patrons in the future to Brookline.

Sincerely yours,

A handwritten signature in black ink, appearing to be 'Eva Chang', written in a cursive style.

Eva Chang,

President  
Duchang Invesments, d/b/a Tous Les Jours  
duchang.invest@gmail.com

January 20, 2021

To Town of Brookline, Board of Select-People

To whom it may concern:

It is my pleasure to provide the letter of reference for Xuan Jiang as a restaurant owner and manager.

I helped Mr. Jiang's restaurant Noah's Kitchen renovation. Mr. Jiang is very caring, helpful and thinking about other people's needs. I really enjoyed working for Mr. Jiang's restaurant and he has great experience in restaurant business. Mr. Jiang is always passionate about start a modern Asian restaurant and brings the best international culinary experience to Brookline community.

Sincerely yours,

Jack Dong

A handwritten signature in black ink that reads "Jack Dong". The signature is fluid and cursive, with a long horizontal stroke extending to the right.

Dong Construction  
8575446477

## **Change of D/B/A**

Applicant: Rue De Saveur, LLC  
DBA: vomFass  
Location: 305 Harvard Street, Brookline, MA 02446  
Application Details: Change of D/B/A

### **Application Details:**

Question of approving the application for a change in D/B/A at 305 Harvard Street.

From  
Rue De Saveur, LLC. d/b/a Rue De Saveur.

To  
Rue De Saveur, LLC. d/b/a vomFass.

### **Reports (Attached):**

Police Department (Approved)



## BROOKLINE POLICE DEPARTMENT

*Brookline, Massachusetts*

MARK P. MORGAN  
ACTING CHIEF OF POLICE

TO: Chief Mark P. Morgan

FROM: Lt. Michael P. Murphy #31

DATE: 26 January 2021

RE: Change of Name: Rue de Saveur, LLC d/b/a Rue de Saveur, 305 Harvard St., Brookline, MA. to a new d/b/a vomFass

---

Sir,

Rue de Saveur, LLC d/b/a Rue de Saveur, holder of an All Kinds Alcohol License, has submitted an application for a change of name to d/b/a vomFass. They are currently located at 305 Harvard St., Brookline, MA.

All paperwork appears in order and I see no reason to deny this application.

Respectfully submitted,  
Lt. Michael P. Murphy #31





OFFICE OF SELECT BOARD  
333 WASHINGTON STREET  
BROOKLINE, MA 02445  
(617) 730-2200

**APPLICATION FOR CHANGE IN D/B/A**

~~COMMON-VICTUALLER LICENSES-~~

Package Store

DATE: January 20, 2021

LOCATION: 305 Harvard Street Brookline, MA 02446

APPLICANT: Rue De Saveur LLC

INDIVIDUAL/PARTNERSHIP/CORPORATION

PRESENT D/B/A: Rue De Saveur

PROPOSED D/B/A vomFASS

**(NOTE: CHANGE OF D/B/A FOR LIQUOR LICENSEES REQUIRES SUBMISSION OF APPLICATION FOR CHANGE IN D/B/A ON LIQUOR LICENSE IN ADDITION TO THIS APPLICATION FOR CHANGE OF D/B/A ON CV LICENSE.)**

APPLICANT SIGNATURE Candace Rassias TITLE: Owner PHONE# [REDACTED]

EMAIL ADDRESS candace.rassias@vomfassusa.com



**VOTE OF CORPORATION**

DATE: January 20, 2021

AT A MEETING OF THE BOARD OF DIRECTORS OF \_\_\_\_\_

HELD AT: \_\_\_\_\_ ON: \_\_\_\_\_

IT WAS DULY VOTED THAT THE CORPORATION APPLY TO THE LICENSING BOARD FOR THE TOWN OF BROOKLINE FOR A

\_\_\_\_\_  
(TYPE OF LICENSE)

FOR THE YEAR \_\_\_\_\_ TO BE EXERCISED ON THE PREMISES LOCATED AT \_\_\_\_\_

VOTED: TO AUTHORIZE \_\_\_\_\_ TO SIGN

THE APPLICATION FOR THE LICENSES IN THE NAME OF \_\_\_\_\_

\_\_\_\_\_ AND TO EXECUTE ON ITS BEHALF ANY NECESSARY PAPERS, AND TO DO ALL THINGS REQUIRED RELATIVE TO THE GRANTING OF THE LICENSE.

THIS CORPORATION HAS \_\_\_\_\_ BEEN RESOLVED.

A TRUE COPY

ATTEST: \_\_\_\_\_

CLERK



**STATE TAX VERIFICATION FORM**

I certify under the penalties of perjury that I, to my best knowledge and belief, have filed all state tax returns and paid all state taxes as required under law.

Candace Rassias

\*Signature of Individual

\_\_\_\_\_  
By: Corporate Officer

\_\_\_\_\_  
[Redacted]

\*\* Social Security #

Voluntary or Federal ID #

\*This license will not be issued unless this certification clause is signed by the applicant.

\*\*Your social security number will be furnished to the Massachusetts Department of Revenue to determine whether you have met tax filing or tax payment obligations. Licensees who fail to correct their non-filing or delinquency will be subject to license suspension or revocation. This request is made under the authority of Massachusetts General Law Chapter 62C, Section 49A.





*The Commonwealth of Massachusetts*  
**Alcoholic Beverages Control Commission**  
 95 Fourth Street, Suite 3, Chelsea, MA 02150-2358  
[www.mass.gov/abcc](http://www.mass.gov/abcc)

**APPLICATION FOR AMENDMENT-Change of Business Entity Information**

☐ **Change of Corporate Name**

☒ **Change of DBA**

- DOR Certificate of Good Standing (Req. for Chg of Corp Name only)
- DUA Certificate of Compliance (Req. for Chg of Corp Name only)
- Change of Corporate Name/DBA Application
- Vote of the Entity
- Payment Receipt (Req. for Chg of Corp Name only)
- Business Structure Documents
  - If Sole Proprietor, **Business Certificate**
  - If partnership, **Partnership Agreement**
  - If corporation or LLC, **Articles of Organization** from the Secretary of the Commonwealth

☐ **Change of Corporate Structure**

- DOR Certificate of Good Standing
- DUA Certificate of Compliance
- Change of Corporate Structure Application
- Vote of the Entity
- Payment Receipt
- Business Structure Documents
  - If Sole Proprietor, **Business Certificate**
  - If partnership, **Partnership Agreement**
  - If corporation or LLC, **Articles of Organization** from the Secretary of the Commonwealth

**1. BUSINESS ENTITY INFORMATION**

Entity Name	Municipality	ABCC License Number
Rue De Saveur, LLC	Brookline	89729-PK-0148

Please provide a narrative overview of the transaction(s) being applied for.

Gourmet foods and spirits shop change of DBA from LLC name to franchise name.

**APPLICATION CONTACT**

The application contact is the person who should be contacted with any questions regarding this application.

Name	Title	Email	Phone
Candace Rassias	Owner	candace.rassias@vomfassusa.com	[REDACTED]

**2. CHANGES TO BUSINESS ENTITY INFORMATION**

**2a. Change of Corporate Name**

Last-Approved Corporate Name:

Requested New Corporate Name:

**2b. Change of DBA**

Last-Approved DBA:

Requested New DBA:

**2c. Change of Corporate Structure**

LLC, Corporation, Sole Proprietor, etc

Last-Approved Corporate Structure

Requested New Corporate Structure

Signature:

*Candace Rassias*

Date: 1/7/2021

Title:

Owner

**APPLICANT'S STATEMENT**

I, Candace Rassias the: ☒ sole proprietor; ☐ partner; ☐ corporate principal; ☐ LLC/LLP manager  
 Authorized Signatory

of Rue De Saveur, LLC  
 Name of the Entity/Corporation

hereby submit this application (hereinafter the "Application"), to the local licensing authority (the "LLA") and the Alcoholic Beverages Control Commission (the "ABCC" and together with the LLA collectively the "Licensing Authorities") for approval.

I do hereby declare under the pains and penalties of perjury that I have personal knowledge of the information submitted in the Application, and as such affirm that all statements and representations therein are true to the best of my knowledge and belief. I further submit the following to be true and accurate:

- (1) I understand that each representation in this Application is material to the Licensing Authorities' decision on the Application and that the Licensing Authorities will rely on each and every answer in the Application and accompanying documents in reaching its decision;
- (2) I state that the location and description of the proposed licensed premises are in compliance with state and local laws and regulations;
- (3) I understand that while the Application is pending, I must notify the Licensing Authorities of any change in the information submitted therein. I understand that failure to give such notice to the Licensing Authorities may result in disapproval of the Application;
- (4) I understand that upon approval of the Application, I must notify the Licensing Authorities of any change in the ownership as approved by the Licensing Authorities. I understand that failure to give such notice to the Licensing Authorities may result in sanctions including revocation of any license for which this Application is submitted;
- (5) I understand that the licensee will be bound by the statements and representations made in the Application, including, but not limited to the identity of persons with an ownership or financial interest in the license;
- (6) I understand that all statements and representations made become conditions of the license;
- (7) I understand that any physical alterations to or changes to the size of the area used for the sale, delivery, storage, or consumption of alcoholic beverages, must be reported to the Licensing Authorities and may require the prior approval of the Licensing Authorities;
- (8) I understand that the licensee's failure to operate the licensed premises in accordance with the statements and representations made in the Application may result in sanctions, including the revocation of any license for which the Application was submitted; and
- (9) I understand that any false statement or misrepresentation will constitute cause for disapproval of the Application or sanctions including revocation of any license for which this Application is submitted.
- (10) I confirm that the applicant corporation and each individual listed in the ownership section of the application is in good standing with the Massachusetts Department of Revenue and has complied with all laws of the Commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting of child support.

Signature: 

Date: 1/7/2021

Title: Owner

**CORPORATE VOTE**

The Board of Directors or LLC Managers of

Rue De Saveur, LLC

Entity Name

duly voted to apply to the Licensing Authority of

Brookline

City/Town

and the

Commonwealth of Massachusetts Alcoholic Beverages Control Commission on

1/7/2021

Date of Meeting

For the following transactions (Check all that apply):

- ☐ Change Corporate Name
- ☐ Change Corporate Structure (i.e. Corp / LLC)
- ☒ Change of DBA
- ☐ Other

"VOTED: To authorize

Candace Rassias

Name of Person

to sign the application submitted and to execute on the Entity's behalf, any necessary papers and do all things required to have the application granted."

A true copy attest,

For Corporations ONLY

A true copy attest,

Corporate Officer / LLC Manager Signature

Corporation Clerk's Signature

(Print Name)

(Print Name)

The Commonwealth of Massachusetts  
Alcoholic Beverages Control Commission  
239 Causeway Street  
Boston, MA 02114  
[www.mass.gov/abcc](http://www.mass.gov/abcc)

**RETAIL ALCOHOLIC BEVERAGES LICENSE APPLICATION  
MONETARY TRANSMITTAL FORM**

APPLICATION SHOULD BE COMPLETED ON-LINE, PRINTED, SIGNED, AND SUBMITTED TO THE  
LOCAL LICENSING AUTHORITY.

REVENUE CODE: RETA

CHECK PAYABLE TO ABCC OR COMMONWEALTH OF MA: NO FEE

A.B.C.C. LICENSE NUMBER (IF AN EXISTING LICENSEE, CAN BE OBTAINED FROM THE CITY): 89729-PK-0148

LICENSEE NAME: Rue De Saveur, LLC

ADDRESS: 305 Harvard Street

CITY/TOWN: Brookline

STATE MA

ZIP CODE 02446

**TRANSACTION TYPE (Please check all relevant transactions):**

☐ Change of Hours

☒ Change of DBA

THE LOCAL LICENSING AUTHORITY MUST MAIL THIS TRANSMITTAL  
FORM ALONG WITH THE CHECK, COMPLETED APPLICATION, AND  
SUPPORTING DOCUMENTS TO:

**ALCOHOLIC BEVERAGES CONTROL COMMISSION  
P. O. BOX 3396  
BOSTON, MA 02241-3396**



# Town of Brookline

## Massachusetts

### Authorization To Hire Request Form

1. Position **TITLE**: Van Driver Grade: Living Wage

2. Department: Council on Aging Division: \_\_\_\_\_

3. Position Control #: \_\_\_\_\_ Prior Incumbent: Nearque Aldin

a. Reason for Leaving: Resignation

4. Budgetary Information:

Department Code: 5410SH33 Budget Code: 510101 % 100

☒ Grant Funded-Name of Grant: COA Gift ☐ Revolving Fund ☐ Enterprise Fund

6. Employment Type:

☒ Full-Time: # of hours/week: 37.5 ☐ Part-Time: # of hours/week: \_\_\_\_\_

☒ Permanent ☐ Temporary: expected end date (required) \_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_

7. Method of Fill:

☒ Promotion – To be Posted Internally from: \_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_ to \_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_

☐ New Hire ☐ Transfer – Please explain: \_\_\_\_\_

8. List the top three essential functions of this position:

1. Provide roundtrip transportation to Brookline older adults from their homes to the Brookline Senior Ctr.
2. Provide round trip transportation to Brookline older adults from their homes to medical appointments.
3. Provide assistance and delivery of Brookline Senior Center Food programs.

9. I have considered the following alternatives to filling this position:

Transportation is a critical need for Brookline's older adults and remains a top priority.

10. The alternatives are less desirable than new hire action for the following reasons:-continued on reverse side-

Van Driver


Authorization To Hire Request Form

11. Suggested sources for specialized recruitment advertising: (other than local papers)

Human Resources will work closely with the department to post the position widely with recruiting websites and multiple targeted affinity group job boards, professional groups and diversity recruiting sites.

12. Please attach the current position description.

13. Signatures:

Department Head Signature: 	Date: <u>1-26-21</u>
Human Resources Director: _____	Date: _____
Town Administrator: _____	Date: _____

14. Approvals:

Date on BOS Agenda: _____	Date Approved: _____
---------------------------	----------------------

15. Notes:

## **VEHICLE DRIVER**

### **PRIMARY PURPOSE**

Vehicle Driver work. Other related work as required.

### **ESSENTIAL DUTIES AND RESPONSIBILITIES**

Driver operates either the COA bus or van or other vehicles owned and operated by the Town of Brookline. The essential function or duties listed below are illustrations of the various types of work performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related, or logical assignment to the position.

**RESPONSIBLE TO:** Director and Program Manager

**QUALIFICATIONS:** Massachusetts Commercial Driver's License, Excellent driving record, ability to deal with seniors.

**HOURS:** Full-time

**RATE OF PAY:** Town living wage

### **Job Description**

Drive the daily bus route; assist patrons getting on and off the bus; ensure that the bus is in good operating condition.

Drive elders from their homes to Senior Center.

Drive elders on various field trips.

Treat elders with proper respect.

Clean and fuel the vehicle, collect the daily donations paid by patrons and turn over monies to the COA office.

Pick up items that are donated to the Senior Center such as medical equipment and food items.

Make referrals to social work staff when social service needs are noticed.

Contact emergency personnel and follow procedures for falls and other accidents.

Use cell phone to communicate any problems with vehicle or rider to office.

Assist in planning schedule of vehicle maintenance; keep the maintenance schedule file up to date.

To conduct any other business needed by Council on Aging office.

Assist in providing feedback to annual surveys.

Attend trainings as mandated by COA office and Town of Brookline.

Participate in Town drug testing program.

Keep driver's license in proper order.

Perform similar or related work as required, or as situation dictates.

### **Supervision**

Works under the direct supervision of the Council on Aging director, following department rules and regulations; the employee follows an established schedule.

### **Work Environment**

Work is performed in a vehicle, which the employee drives. The vehicle may be driven in winter conditions with snow and ice on the road or during heavy rain. The employee is in constant contact with the office.

The employee operates a vehicle.

The employee has contact with patrons, the general public incidental to essential functions, and other Town departments.

Errors would result in monetary loss, personal injury or injury to others, or delay or loss of service.

### **RECOMMENDED MINIMUM QUALIFICATIONS**

#### **Education and Experience**

High school diploma, or equivalent; two to three years of driving or an equivalent combination of education and experience.

#### **Additional Experience**

Valid Massachusetts Commercial Driver's License.

#### **Knowledge, Ability and Skill**

Knowledge of vehicle maintenance and handling characteristics.

Ability to assist elderly patrons.

Must have an excellent driving record and skills in driving vehicle in all types of weather conditions such as snow, ice or rain.

Ability to follow a schedule of activities.

Ability to recognize the need for maintenance or repair of the vehicle.

### **PHYSICAL REQUIREMENTS**

Moderate physical effort is required when driving for long periods of time. The employee is regularly required to use hands to operate equipment, reach with hands and arms, and operate, steer, and maneuver a commercial vehicle under various weather conditions. The employee is also required to aid passengers getting on and off the vehicle. Vision requirement includes the ability to read documents and operate a motor vehicle.

This job description does not constitute an employment agreement between the employer and employee, and is subject of change by the employer, as the needs of the employer and requirement of the job change.





# Town of Brookline

## Massachusetts

### Authorization To Hire Request Form

1. Position **TITLE**: Program Manager Grade: T-5

2. Department: Council on Aging Division: \_\_\_\_\_

3. Position Control #: \_\_\_\_\_ Prior Incumbent: Julie Washburn

a. Reason for Leaving: Promotion

4. Budgetary Information:

Department Code: 54105410 Budget Code: 510101 % 100

☐ Grant Funded-Name of Grant: \_\_\_\_\_ ☐ Revolving Fund ☐ Enterprise Fund

6. Employment Type:

☒ Full-Time: # of hours/week: 37.5 ☐ Part-Time: # of hours/week: \_\_\_\_\_

☒ Permanent ☐ Temporary: expected end date (required) \_\_\_\_/\_\_\_\_/\_\_\_\_

7. Method of Fill:

☒ Promotion – To be Posted Internally from: \_\_\_\_/\_\_\_\_/\_\_\_\_ to \_\_\_\_/\_\_\_\_/\_\_\_\_

☐ New Hire ☐ Transfer – Please explain: \_\_\_\_\_

8. List the top three essential functions of this position:

1. Plans and implements programs for Brookline older adults.

2. Coordinates and supervises program leaders.

3. Coordinates and supervises media communications for COA and Senior Center programs & services.

9. I have considered the following alternatives to filling this position:

This position has been vacant since July 1 to provide budget relief in FY21. It is now imperative to fill

the position.

10. The alternatives are less desirable than new hire action for the following reasons:-continued on reverse side-

\_\_\_\_\_  
\_\_\_\_\_

Program Manager


Authorization To Hire Request Form

11. Suggested sources for specialized recruitment advertising: (other than local papers)

Human Resources will work closely with the department to post the position widely with the ProDiversity Network,  
ZipRecruiter, Indeed, which all have multiple targeted affinity group job boards, as well as related professional groups.

12. Please attach the current position description.

13. Signatures:

Department Head Signature: 	Date: <u>1-26-21</u>
Human Resources Director: _____	Date: _____
Town Administrator: _____	Date: _____

14. Approvals:

Date on BOS Agenda: _____	Date Approved: _____
---------------------------	----------------------

15. Notes:

**PROGRAM MANAGER – COUNCIL ON AGING****Grade T-05****Position Purpose:**

The purpose of this position is to provide administrative and supervisory work for various programs offered to the senior citizens of Brookline. The incumbent performs all other related work as required.

**Supervision:**

*Supervision Scope:* Performs highly responsible functions requiring a high level of initiative and judgment in administering and supervising various programs.

*Supervision Received:* Works under the general supervision of the Council on Aging Director. Confers with his/her supervisor when unusual situations arise.

*Supervision Given:* Has supervisory responsibility for the Group Leader, Aides, several part-time clerical staff, college interns and various program volunteers. Responsibility involves assigning tasks, providing direction and assistance, as well as assisting the COA Director with hiring, firing and disciplining employees.

**Job Environment:**

Some work is performed under typical office conditions. Work requires visiting various locations within the building to supervise and run programs and may occasionally travel to events offsite.

Operates automobile, computers, printers, telephone, and other standard office equipment.

Has frequent contact with recipients of services, health care providers, community agencies, nursing homes, retirement communities, assisted living facilities, various social welfare agencies, WSES, Rogerson Communities, various cultural and religious organizations and groups, Brookline Community Fund, educational institutions, private professionals, artists, performers, Goddard House, Coolidge Corner Theater, Brookline Housing Authority, the general public and other town departments. Contacts involve discussing the needs of service recipients and programs offered to Brookline Senior Citizens.

Has access to confidential information regarding service recipients.

Errors could result in reduced levels of service to the community and possible legal ramifications.

*Town of Brookline, MA  
Program Manager-COA*

1

### **Essential Functions:**

*(The essential functions or duties listed below are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related or a logical assignment to the position.)*

Develops, plans and administers new programs in conjunction with the Council on Aging Director as needed. Evaluates programs. Coordinates programs offered by outside agencies. Assesses the need for programs.

Assists in writing and supporting grant proposals.

Supervises volunteers and program leaders for various programs such as Arts, ESL, Wellness, Stimulation, Socialization, Entertainment and various support groups. Continually assesses and evaluates programs. Implements programs. Provides consultation regarding appropriate participants.

Publicizes programs via flyers, press releases to community, news outlets, and outreach to community groups and other social workers. Prepares daily schedules of programs and a monthly calendar of programs offered. Designs and maintains various bulletin boards at the Senior Center. Contributes to a monthly agency calendar.

Leads programs including exercise and book groups. Organizes various lunch options such as: "Let's go out to lunch group", birthday parties, Brookline bistro and the Newcomers group.

Acts as a liaison to Adult Education teachers and program leaders. Assists with setting up for programs, room coordination and scheduling.

Supervises various support groups. Assesses the need for support groups, implements groups, provides consultation regarding appropriate group participants. Evaluates effectiveness of groups.

Coordinates the annual Senior Craft Fair.

Assists with the recruitment of program volunteers.

Acts as a liaison to various community, cultural and religious agencies including the Boston Chinese Golden Age Center, the Jewish Vocational Service, and the Jewish Community Center.

Coordinates various art exhibits. Schedules artists, publicizes events and organizes receptions. Assists in the coordination of the weekly film series.

Represents the Brookline Council on Aging at outside activities including the Larz Anderson Park festival and the Coolidge Corner Arts Festival.

Performs similar or related work as required, directed or as situation dictates.

*Town of Brookline, MA  
Program Manager-COA*

**Recommended Minimum Qualifications:**

Education, Training and Experience:

Master's in Social Work required with expertise in Gerontology and three to five years of related experience; L.I.C.S.W. required.

Knowledge, Ability and Skill:

*Knowledge:* Knowledge of services and resources available to the elderly. Detailed knowledge of the services provided by the Brookline Council on Aging. Knowledge of group work. Special knowledge in geriatric social work. General knowledge of major diseases and mental health issues related to the elderly. Knowledge of related state and federal laws and regulations. Knowledge of popular database, word processing and spreadsheet applications.

*Ability:* Ability to assess and develop programs for the elderly. Ability to recognize problems/issues with clients. Ability to work with individuals, families and community agencies. Ability to compile various computerized reports.

*Skill:* Strong supervisory skills. Skill in all of the above listed technology, tools and equipment.

Physical Requirements:

*The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

Tasks may involve extended periods of time at a keyboard or workstation. Vision and hearing at, or correctable to normal ranges is necessary. Must be able to drive an automobile. Must be able to communicate verbally. Requires the ability to operate, maneuver and/or control the actions of equipment, machinery, tools, and/or materials used in performing essential functions.

*(This job description does not constitute an employment agreement between the employer and employee. It is used as a guide for personnel actions and is subject to change by the employer as the needs of the employer and requirements of the job change.)*



# Town of Brookline

## Massachusetts

### Authorization To Hire Request Form

1. Position **TITLE:** Home Care Coordinator (HELP) Grade: T-3

2. Department: Council on Aging Division: \_\_\_\_\_

3. Position Control #: \_\_\_\_\_ Prior Incumbent: Jamie Jensen

a. Reason for Leaving: Promotion

4. Budgetary Information:

Department Code: 54105410 Budget Code: 510101 % 100

☐ Grant Funded-Name of Grant: \_\_\_\_\_ ☐ Revolving Fund ☐ Enterprise Fund

6. Employment Type:

☒ Full-Time: # of hours/week: 37.5 ☐ Part-Time: # of hours/week: \_\_\_\_\_

☒ Permanent ☐ Temporary: expected end date (required) \_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_

7. Method of Fill:

☐ Promotion – To be Posted Internally from: \_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_ to \_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_

☒ New Hire ☐ Transfer – Please explain: \_\_\_\_\_

8. List the top three essential functions of this position:

1. Coordinates the COA Home Care program.

2. Recruits, trains and supervises home care workers.

3. Assesses, assists and coordinates with older adults in need of home care.

9. I have considered the following alternatives to filling this position:

This position is essential in supervising the Home Care program for Brookline older adults.

10. The alternatives are less desirable than new hire action for the following reasons:-continued on reverse side-

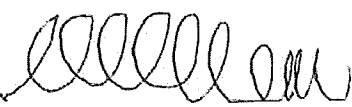
Authorization To Hire Request Form

11. Suggested sources for specialized recruitment advertising: (other than local papers)

Human Resources will work closely with the department to post the position widely with the ProDiversity Network, ZipRecruiter, Indeed, which all have multiple targeted affinity group job boards, as well as related professional groups.

12. Please attach the current position description.

13. Signatures:

Department Head Signature: 	Date: <u>1-7-21</u>
Human Resources Director: _____	Date: _____
Town Administrator: _____	Date: _____

14. Approvals:

Date on BOS Agenda: _____	Date Approved: _____
---------------------------	----------------------

15. Notes:

**HOME CARE PROGRAM COORDINATOR****Grade T-03****Position Purpose:**

The purpose of this position is to provide administrative and supervisory work for the Home Care Program offered to the senior citizens of Brookline. The incumbent performs all other related work as required

**Supervision:**

*Supervision Scope:* Performs highly responsible functions requiring initiative and judgment in administering and supervising the home care program.

*Supervision Received:* Works under the general supervision of the Supervisor of Services. Confers with his/her supervisor when unusual situations arise.

*Supervision Given:* Has supervisory responsibility for the Assistant Home Care Program Coordinator including assigning tasks, providing direction and assistance. Supervises volunteers and has indirect supervisory responsibility for Home Care workers.

**Job Environment:**

Majority of work is performed under typical office conditions; home visits require travel and exposure to various weather conditions. Work often requires visiting various locations and buildings and may occasionally involve travel to events offsite. During home visits incumbent may have exposure to communicable diseases and other health and safety risks. Occasionally attends evening meetings.

Operates automobile, computers, printers, telephone, and other standard office equipment.

Has frequent contact with recipients of services and their families, health care providers, social service and non-profit organizations, volunteers, home care workers, other town departments and the general public. Contacts involve discussing the needs of service recipients.

Has access to confidential information regarding service recipients and home care workers.

Errors could result in reduced levels of service to the community.

*Town of Brookline, MA  
Home Care Program Coordinator  
1*



**Essential Functions:**

*(The essential functions or duties listed below are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related or a logical assignment to the position.)*

Provides assessment, information and referral, case management, advocacy, crisis intervention, and support to elderly home care clients and their families through home visits and telephone contact.

Collaborates with other professionals and care providers to coordinate services and clarify client's needs.

Matches elderly clients with appropriate home care workers.

Recruits and interviews home care workers for the H.E.L.P. Program. Prepares training materials and provides training and ongoing education to home care workers. Ensures police CORI checks are conducted for new home care workers.

Calculates monthly statistics using the database application; prepares various reports as required.

Supervises the Assistant Home Care Program Coordinator.

Informs clients of changes to the program.

Writes and sends out a bi-monthly newsletter for home care workers.

Supervises M.S.W. student interns from local universities and colleges working for the Council on Aging.

Attends various meetings and speaks on behalf of the H.E.L.P. program to inform residents of the services available. Speaks at various groups and meetings held by other Council on Aging Programs.

Assists the Council on Aging Director prepare grants for funding and grant reports.

Trains, supervises and schedules volunteers for the Information and Referral Desk.

Opens and closes the building as needed.

Performs similar or related work as required, directed or as situation dictates.

*Town of Brookline, MA  
Home Care Program Coordinator*

2

**Recommended Minimum Qualifications:**

Education, Training and Experience:

Masters in Social Work required with expertise in Gerontology and two years related experience; L.I.C.S.W. required.

Knowledge, Ability and Skill:

*Knowledge:* Knowledge of services and resources available to the elderly. Detailed knowledge of the services provided by the Brookline Council on Aging. Knowledge of clinical social work. Special Knowledge in geriatric social work/geriatric care case management and protective services. General knowledge of major diseases and mental health issues related to the elderly. Knowledge of related state and federal laws and regulations. Knowledge of popular database, word processing and spreadsheet applications.

*Ability:* Ability to recognize problems/issues with clients. Ability to work with individuals, families and community agencies. Ability to compile various computerized reports.

*Skill:* Strong supervisory skills. Public speaking skills. Strong computer skills. Skill in all of the above listed technology, tools and equipment.

Physical Requirements:

*The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

Tasks may involve extended periods of time at a keyboard or workstation. Vision and hearing at, or correctable to normal ranges is necessary. Must be able to drive an automobile. Must be able to access client's homes, including climbing stairs when necessary. Must be able to communicate verbally. Requires the ability to operate, maneuver and/or control the actions of equipment, machinery, tools, and/or materials used in performing essential functions.

*(This job description does not constitute an employment agreement between the employer and employee. It is used as a guide for personnel actions and is subject to change by the employer as the needs of the employer and requirements of the job change.)*



# Town of Brookline

## Massachusetts

### Authorization To Hire Request Form

1. Position **TITLE**: Group Leader Grade: GN-2

2. Department: Council on Aging Division: \_\_\_\_\_

3. Position Control #: \_\_\_\_\_ Prior Incumbent: Patricia Burns

a. Reason for Leaving: Retirement

4. Budgetary Information:

Department Code: 54105410 Budget Code: 510102 % 100

☐ Grant Funded-Name of Grant: \_\_\_\_\_ ☐ Revolving Fund ☐ Enterprise Fund

6. Employment Type:

☐ Full-Time: # of hours/week: \_\_\_\_\_ ☒ Part-Time: # of hours/week: 22.125

☒ Permanent ☐ Temporary: expected end date (required) \_\_\_\_/\_\_\_\_/\_\_\_\_

7. Method of Fill:

☐ Promotion – To be Posted Internally from: \_\_\_\_/\_\_\_\_/\_\_\_\_ to \_\_\_\_/\_\_\_\_/\_\_\_\_

☒ New Hire ☐ Transfer – Please explain: \_\_\_\_\_

8. List the top three essential functions of this position:

1. Recruits, trains and supervises COA volunteers

2. Assists program manager with programs at the senior center.

3. Coordinates Food Commodity Program.

9. I have considered the following alternatives to filling this position:

\_\_\_\_\_  
\_\_\_\_\_

10. The alternatives are less desirable than new hire action for the following reasons:-continued on reverse side-

This position is critical for the COA. Without our volunteers our programs and services would be

severely reduced.

Group Leader

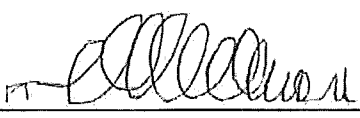
Authorization To Hire Request Form

11. Suggested sources for specialized recruitment advertising: (other than local papers)

Human Resources will work closely with the department to post the position widely with the ProDiversity Network, ZipRecruiter, Indeed, which all have multiple targeted affinity group job boards, as well as related professional groups.

12. Please attach the current position description.

13. Signatures:

Department Head Signature: 	Date: <u>1-26-21</u>
Human Resources Director: _____	Date: _____
Town Administrator: _____	Date: _____

14. Approvals:

Date on BOS Agenda: _____	Date Approved: _____
---------------------------	----------------------

15. Notes:

**GROUP LEADER – COA**

**Grade GN-02**

**PRIMARY PURPOSE**

Program assistance and organizational work relating to providing programs for seniors; other related work, as required.

**ESSENTIAL DUTIES AND RESPONSIBILITIES**

*The essential functions or duties listed below are illustrations of the various types of work performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related, or a logical assignment to the position.*

Assist in operating programs at the Brookline Senior Center; make coffee and prepare breakfast buffet; assist with serving lunch and desert to large parties.

Responsible for a group of seniors on Golden Age trips; assist program manager with running the daily programs; responsible for the “out to lunch” group; assist in the planning, promotion and running of educational and recreational programs.

Supervise and evaluate volunteers; provide information, referral and support to elders and their families on aging issues; responsible for monitoring and supervising daily drop-in participants at the senior center; weekly women's discussion group, good organizational skills required to maintain our group attendance and financial records and supplies. Preview and interview performers, videos, and entertainers.

Perform similar or related work as required, or as situation dictates.

**SUPERVISION**

Works under the direct supervision of the Council on Aging Director, following department rules, regulations and policies; the employee is provided with general instructions.

**WORK ENVIRONMENT**

Work is performed in the senior center, including a restaurant style kitchen; the employee also takes trips with seniors; the work environment has a moderate level of noise; the workload is stable.

The employee operates standard office equipment and kitchen appliances, such as stove, mixer, dishwasher and coffee machine.

The employee is in constant contact with patrons, and various town departments, social service agencies, and local hospitals.

Errors could result in delay or loss of service.

**RECOMMENDED MINIMUM QUALIFICATIONS**

*Brookline, Massachusetts  
Group Leader – Council on Aging*

*1*

## 4.G.

### EDUCATION AND EXPERIENCE

High school diploma, or equivalent; two to three years of experience in an elder care environment organizing programs; or an equivalent combination of education and experience.

### ADDITIONAL REQUIREMENT

First Aid Training/CPR

### KNOWLEDGE, ABILITY AND SKILL

Knowledge of basic elder care, safety regulations, and program organization.

Ability to assist elderly patrons, plan and organize events, follow a schedule of activities, and respond quickly to problems and emergency situations.

Skill in working with the elderly; communication, food handling, and organization skills.

### PHYSICAL REQUIREMENTS

Moderate physical effort required organizing programs and serving large parties. The employee is regularly required to stand, walk, hear, speak, climb, move furniture, and may be required to lift up to 30 pounds. Vision requirements include the ability to read documents and use a computer.

*This job description does not constitute an employment agreement between the employer and employee, and is subject to change by the employer, as the needs of the employer and requirements of the job change.*

Brookline, Massachusetts  
Group Leader - Council on Aging

2

## **Lodging House Agent**

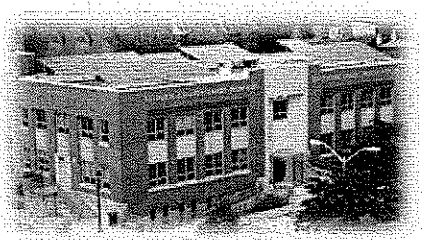
Owner: Longwood Guest House / Josh Danesh  
Location: 83 Longwood Ave

### **Application Details:**

Question of approving the application for Lodging House Agent Jephthe Jeanniton for Longwood Guest House at 83 Longwood Ave.

### **Reports:**

Health Department (Approved – Pending training)  
Police Department (Approved)



**TOWN OF BROOKLINE  
DEPARTMENT OF PUBLIC HEALTH**

**11 Pierce Street, Brookline, Massachusetts, 02445**

**Telephone: (617) 730-2300 Facsimile: (617) 730-2296**

**Website: [www.brooklinema.gov](http://www.brooklinema.gov)**

**Dr. Swannie Jett, DrPH, MSc**  
**Director of Public Health**  
**& Human Services**

**BROOKLINE DEPARTMENT OF PUBLIC HEALTH  
M E M O R A N D U M**

To: Melvin Kleckner,  
Town Administrator  
Board of Selectmen

From: Dr. Swannie Jett, Dr.PH, MSc  
Director of Public Health and Human Services

Date: 2/10/2021

Re: Lodging House Agent Approval

---

Please be advised that this Department has reviewed the applications for new Lodging House Agent at the following licensed Lodging Facility:

- Longwood Guest House/Josh Danesh  
83 Longwood Ave  
Proposed Agent: Jephthe' Jeanniton

This recommendation is under the condition that the proposed agent attends the Lodging House Training scheduled for February 17, 2021 at 3:00 pm via Zoom.





**BROOKLINE POLICE DEPARTMENT**  
*Brookline, Massachusetts*

Superintendent Mark P. Morgan  
Acting Chief of Police

To: Acting Chief Mark Morgan

From: Lieutenant Derek Hayes

Date: January 13, 2021

Subj: Longwood Guest House, 83 Longwood Ave -- Change in Lodging House Agent

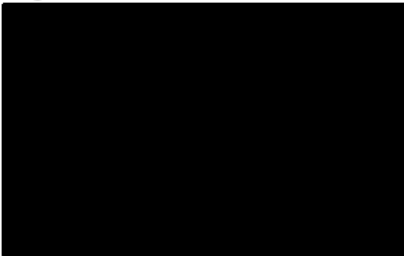
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Sir:

On behalf of the Longwood Guest House, Owner Josh Danesh has as applied for a change in the lodging house agent to Jephthe Jeanniton. The Longwood Guest House is a licensed lodging house located at 83 Longwood Ave in Brookline.

New Lodging House Agent:

Jephthe Jeanniton



A BOP check revealed no negative information. A search of other applicable law enforcement data bases were queried and no negative information was found.

Mr. Jeanniton is currently employed as a Client Services Supervisor at Lasell University in Newton, MA.

I find no reason to reject this application.

Respectfully submitted,

Lieutenant Derek Hayes #26





OFFICE OF SELECT BOARD  
333 WASHINGTON STREET  
BROOKLINE, MA 02445  
(617) 730-2200

**APPLICATION FOR CHANGE OF LODGING HOUSE AGENT**

LODGING HOUSE AND OWNER'S NAME: Longwood Guest House/Josh Danesh

NAME OF NEW AGENT: Jephté Jeanniton

HOME ADDRESS: 83 Longwood Ave. [REDACTED] TELEPHONE: [REDACTED]

PLACE OF BIRTH: Port-au-Prince Haiti DATE OF BIRTH: [REDACTED]

ARE YOU A CITIZEN: YES: ☒ NO: ☐ ALIEN CARD NUMBER: \_\_\_\_\_

FATHER'S NAME: Joseph P. Jeanniton MOTHER'S MAIDEN NAME: Marie Marthe Rigeaud

VETERAN: YES: ☐ NO: ☒

RESIDENCES: (DATE AND PLACE)

- 1.) [REDACTED] Arlington, MA 02747 from 5/2011 - 12/31/2020
- 2.) \_\_\_\_\_
- 3.) \_\_\_\_\_
- 4.) \_\_\_\_\_

EDUCATION:

- 1.) Lowell Institute, Camb. MA
- 2.) Umass Boston, Boston, MA
- 3.) Information Systems Certificate, MIT, Cambridge
- 4.) \_\_\_\_\_

EMPLOYMENT:

- 1.) Lasell University, Client Services Supervisor - Newton, MA
- 2.) Tufts University - Senior IT Client Support Specialist - Medford, MA
- 3.) \_\_\_\_\_
- 4.) \_\_\_\_\_

APPLICANT SIGNATURE [Signature]

TITLE: Resident Agent PHONE# [REDACTED]

EMAIL ADDRESS: jjeanniton@lasell.edu

# LONGWOOD GUEST HOUSE

## RESIDENT AGENT UPDATE FORM/RESUME ATTACHED

1. APPLICANT'S DETAILS	
Last Name	First Name
Jeanniton	Jephthe
Home address:	
83 Longwood Avenue, Brookline, MA 02446 Apt. 7B	
Telephone #:	
Home/Mobile: [REDACTED]	
Work/Other: [REDACTED]	
Email address: jjeanniton@lasell.edu	

2. EMPLOYMENT RECORD		
1. Current/most recent employer/organisation		
Company/Address/Job Title:	From:	To:
Brief description of duties: See Resume		

3. EDUCATION			
Please tell us about your education and any qualifications which you feel are relevant			
Name of school/college/ university/training body	Subject studied	Qualification/ Level	Date gained
See Resume			

5. REFERENCE	
Please give name, address and position/occupation of ONE character reference	
1. Name/Position/Organization: Dia Damali, Consultant, BCAD	
Address/Tel/Email: brooklinehospitality@gmail.com, [REDACTED]	

6. CRIMINAL CONVICTIONS	
Do you have any criminal convictions? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	
If Yes please give details on a separate sheet, this should exclude any spent convictions under Section 4(2) of the Rehabilitation of Offenders Act 1974.	

7. DECLARATION AND SIGNATURE	
The information supplied in this application form is accurate to the best of my knowledge.	
Signed	Date
[Signature]	12-29-2024

By signing and returning this application form you consent to The Longwood Guest House and the Town of Brookline using and keeping information about you provided by you. Thank you!

## IT/Desktop Support Professional

*Detail-oriented professional with extensive experience providing assistance to computer users by responding to questions/enquiries, resolving technical problems, and maintaining a company's network, software, as well as computer equipment.*

### AREAS OF EXPERTISE

- Ability to identify and resolve computer-related problems from installing hardware, updating software, compiling reports to recommending industry products to improve productivity.
- Expert in providing prompt technical support to senior management within high-energy business environments. Skilled in supporting strategic decision-making, determining areas in need of improvement, liaising with stakeholders, and measuring results against objectives.
- Outstanding problem solving and active listening skills; able to diffuse difficult customer situations with tact and ease, achieving winning outcomes for both the customer and company.
- Excellent interpersonal skills; ability to get along with diverse personalities while exhibiting versatility, adaptability, and professional attitude within multicultural environment. Bilingual in French and English.

### TECHNICAL PROFICIENCIES

*Platforms:* Microsoft Windows operating systems and MacOS

*Tools:* Microsoft ActiveSync, Active Directory and group policies, data recovery tools, Microsoft Exchange, backup strategies, WINS, DHCP, DNS, and TCP/IP

*Hardware:* Ethernet, network cabling, wireless, and remote access methodologies

## Professional Experience

Lasell University, Newton, MA

### Client Services Supervisor – PMC (11/2018 – Present)

Provide prompt technical support, oversee preventative as well as scheduled repair/maintenance, and advise on matters related to desktop technology and multimedia services within Pine Manor College. Address issues/requests pertaining to desktop computers, laptops, mobile devices, printers, copiers, software (including installs), and many other devices. Conduct field visits to offices to detect and resolve technical concerns with an aim to optimize systems' performance. Maintain client records, building client relationships, forward customer requests to appropriate personnel, answer incoming phone calls, respond to customer inquiries, and offer technical assistance to customers.

#### Key Achievements:

- Recognized by senior executives for displaying hard work, dedication, and dependability as well as delivering prompt and reliable service.

Tufts University, Medford, MA

### Senior IT Client Support Specialist - Tufts Technology Services (2013 – 2018)

Installed computer hardware and programs, improved network performance, password problems, responded to breakdowns, and administered scheduled maintenance sessions. Protected systems from viruses, troubleshot peripheral devices, updated software, and utilized IT tools for remote management of desktops and laptops.

...Continued...

## Jephté Jeanniton

Page Two

Identified clients' requirements and provided appropriate solutions as per business needs and user work styles. Guided and informed colleagues and department contacts about latest and emerging technologies. Accelerated senior management's decision making process with regards technology purchases, decisions, and changes. Evaluated application and infrastructure security to identify areas of potential risk and provide recommendations for mitigation. Spearheaded cross-training on a variety of technologies and services to improve the overall support capability and versatility of Tufts support resources. Devised company's deploy procedures by utilizing Ivanti and deploy studio.

### *Key Achievements:*

- Served as a main point of contact for IT Client Support Specialists and colleagues by resolving critical, emergency, and difficult technical issues.
- Revamped infrastructure of European Center and contributed towards company's summer program.
- Functioned as a primary technician for all the University's VIPs and trustees.

### Constant Contact, Cambridge MA

#### **IT Administrator (2005 – 2013)**

Provided Level 1 desktop technical support to local and remote end users while meeting clients' expectations. Resolved software application and hardware issues to minimize system downtime. Conducted individual adds, moves, changes and upgrades of desktop systems and printers along with building, installing and configuring desktop systems. Evaluated and analyzed new desktop technology including hardware, software, and peripherals for office use as well as documented test plans and proposed continuous improvements. Facilitated new employee orientations and provided computer education related to company's corporate systems to users. Directed technicians in all new software deployment and updates to maintain performance and efficiency. Communicated with Dell for equipment ordering as per given specifications.

### *Key Achievements:*

- Designed and documented desktop support procedures for all technicians.
- Served as a main point of contact for new hires while leading the newly recruited IT staff orientation along with introduction to all company software.
- Introduced equipment loan program for employees as per staff's convenience.
- Worked as Lead technician for all Regional Directors across the US while fulfilling all requirements and exceeding expectations.

Additional Experience as **IT Specialist/Co-Learning Director** at Year Up Inc., Boston, MA and **Customer Support/Helpdesk Specialist** at M.I.T Computer Connection, Cambridge, MA.

## Education and Training

Lowell Institute, Cambridge, MA  
UMass Boston, Boston, MA

— Certifications —

Apple Certified Mac Technician, Network+ and A+ Core and Operating System Technologies Certification, AppleCare service, Dell EMC Certified Technician, MSCE, CCNA, ITIL certified

— Professional Development —

Information Systems Certificate Program, M.I.T, Cambridge, MA

## **Change of Manager of Record**

Applicant: CCLLH, LLC  
DBA: The Inn at Brookline  
Location: 1200 Beacon Street, Brookline, MA 02446

### **Application Details:**

Question of approving application for Change of Manager of Record for CCLLH, LLC d/b/a The Inn at Brookline at 1200 Beacon Street.

From  
Anthony Adianto

To  
Mohamaed Hashesh

### **Reports (Attached):**

Police Department (Approved)

## **Checklist for Change of Manager**



- ☒ Cover Letter for Application with list of enclosed documents with page numbers
  - ☒ Filing Fee receipt paid to the Alcoholic Beverages Control Commission
  - ☒ Monetary Transmittal Form
  - ☒ Manager Application
  - ☒ CORI Authorization
  - ☒ Vote of Entity
  - ☒ License Interview Form
  - ☒ CORI release form
  - ☒ Three letters of reference
  - ☒ Proof of Citizenship (Manager must be a US citizen)
  - ☒ IN-PERSON class for the safe service of alcohol certification
  - ☒ Crowd Manager Certification from the Massachusetts Department of Fire Services (Manager of Record – If there is a bar regardless of number)
- 
- ☒ Report from Brookline Police Chief



MARK P. MORGAN  
ACTING CHIEF OF POLICE

## BROOKLINE POLICE DEPARTMENT

*Brookline, Massachusetts*

TO: Chief Mark P. Morgan

FROM: Lt. Michael P. Murphy #31

DATE: 8 February 2021

RE: CCLLH, LLC, d/b/a The Inn at Brookline: Request Change of Manager of Record

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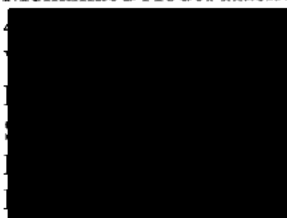
Sir,

On behalf of CCLLH, LLC, d/b/a The Inn at Brookline, Atty. Steffani Boudreau, of the Law Office of Robert L. Allen, 300 Washington St, Brookline, MA 02445, has applied for a change of Manager of Record from Anthony Adianto to Mohamed Hashesh. The Inn at Brookline, 1200 Beacon St., Brookline MA 02446 currently holds an All Alcohol Beverage License (ABCC # 014800003). There have not been any negative issues with the current all alcohol beverage licenses.

A vote at a directors meeting of CCLLH, Inc. was held on December 1, 2020 and submitted. This vote authorized the change to Mr. Hashesh as Manager of Record for CCLLH, LLC.

Proposed Manager of Record:

Mohamaed Abdel Hashesh



Email: mhashesh@brooklineinn.com

Mr. Hashesh has submitted a US passport for identification purposes. He was born in Egypt and attended American University in Cairo. Mr. Hashesh has worked in the hospitality industry since 2008 and currently works for the Inn at Brookline and the Cambridge Courtyard Marriott. Three letters of recommendation were also submitted on his behalf. He is certified in the safe service of alcohol and as a crowd manager.

Mr. Hashesh will submit a full set of finger prints with the Brookline Police Department when in-person fingerprinting resumes. These will be used for the purpose of conducting a State and National criminal record background check. The results of those queries come back from the State with no negative



Public Safety Building, 350 Washington Street, Brookline, Massachusetts 02445  
Telephone (617) 730-2249 ♦ Facsimile (617) 730-8454



## 8.A.

results. Recent queries were conducted of other law enforcement databases and they revealed no disqualifying information on Mr. Hashesh.

A meeting, telephone or Zoom will be held with Mr. Hashesh to discuss the Town of Brookline's Sale of Alcoholic Beverages Regulations and what to expect during an administrative inspection. A copy of the regulations has been sent to him. As part of our discussion of the Alcoholic Beverages Regulations, we will discuss the need for either the Manager of Record or an Alternate Manager is on site at all times.

At this time, I find no reason to deny this application.

Respectfully submitted,  
Lt. Michael P. Murphy #31





300 WASHINGTON ST.  
BROOKLINE, MA 02445

P. (617) 383-6000  
F. (617) 383-6001

From the Desk of:  
Steffani Boudreau, Esq.  
sboudreau@bobaallenlaw.com

January 5, 2021

**VIA HAND DELIVERY**

Board of Selectmen  
Town of Brookline  
333 Washington Street  
Brookline, MA 02445

**RE: Change of Manager Application  
CCLLH, LLC d/b/a Holiday Inn Boston Brookline  
1200 Beacon Street, Brookline, Massachusetts**

Dear Members of the Board of Selectmen:

I write on behalf of CCLLH, LLC d/b/a Holiday Inn Boston Brookline located at located at 1200 Beacon Street, Brookline, Massachusetts regarding its Application for a Change of Manager for its 7-Day All Alcoholic Beverages License.

For the **Change of Manager Application** my client is requesting the following change:

Current Manager  
Anthony Adianto

Proposed Manager  
Mohamed Hashesh

In support of this application, kindly find the following documents enclosed:

- ABCC Monetary Transmittal Form
- License Amendment Change of Manager
- CORI Request Form (ABCC)
- CORI Form (Town of Brookline)
- License Interview Form
- Corporate Vote
- Crowd Manager Certification
- Proof of Citizenship
- Three (3) Letters of Recommendation
- Resume
- Check for \$100 made payable to the Town of Brookline (Application fee)
- Check for \$10.50 made payable to the Town of Brookline (TAB Notice fee)

Board of Selectmen

Page 2

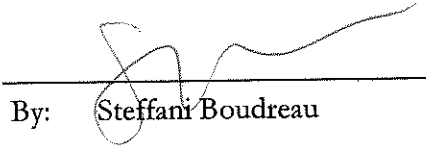
January 5, 2021

Kindly place this matter on the Board of Selectman's Agenda at the earliest available date. Please be in contact at my above telephone number if you have any concerns or if any further information is required.

Thank you for your assistance.

Best Regards,

LAW OFFICE OF ROBERT L. ALLEN, JR. LLP

By:  Steffani Boudreau

Enclosures

Board of Selectmen

Page 3

January 5, 2021

**ABCC TRANSMITTAL FORM AND ONLINE PAYMENT RECEIPT**

8.A.



The Commonwealth of Massachusetts  
Alcoholic Beverages Control Commission  
95 Fourth Street, Suite 3, Chelsea, MA 02150-2358  
www.mass.gov/abcc

RETAIL ALCOHOLIC BEVERAGES LICENSE APPLICATION  
MONETARY TRANSMITTAL FORM

**AMENDMENT-Change of Manager**

APPLICATION SHOULD BE COMPLETED ON-LINE, PRINTED, SIGNED, AND SUBMITTED TO THE LOCAL  
LICENSING AUTHORITY.

ECRT CODE: RETA

Please make \$200.00 payment here: ABCC PAYMENT WEBSITE

PAYMENT MUST DENOTE THE NAME OF THE LICENSEE CORPORATION, LLC, PARTNERSHIP, OR INDIVIDUAL AND INCLUDE THE  
PAYMENT RECEIPT

ABCC LICENSE NUMBER (IF AN EXISTING LICENSEE, CAN BE OBTAINED FROM THE CITY)

00003-RS-0148

ENTITY/ LICENSEE NAME

CCLH, LLC

ADDRESS

1200 Beacon Street

CITY/TOWN

Brookline

STATE

MA

ZIP CODE

02446

For the following transactions (Check all that apply):

- |  |   |   |   |
|--|---|---|---|
| <input type="checkbox"/> New License                                   | <input type="checkbox"/> Change of Location   | <input type="checkbox"/> Change of Class (i.e. Annual / Seasonal)         | <input type="checkbox"/> Change Corporate Structure (i.e. Corp / LLC) |
| <input type="checkbox"/> Transfer of License                           | <input type="checkbox"/> Alteration of Licensed Premises  | <input type="checkbox"/> Change of License Type (i.e. club / restaurant)  | <input type="checkbox"/> Pledge of Collateral (i.e. License/Stock)    |
| <input checked="" type="checkbox"/> Change of Manager                  | <input type="checkbox"/> Change Corporate Name  | <input type="checkbox"/> Change of Category (i.e. All Alcohol/Wine, Malt) | <input type="checkbox"/> Management/Operating Agreement               |
| <input type="checkbox"/> Change of Officers/<br>Directors/LLC Managers | <input type="checkbox"/> Change of Ownership Interest<br>(LLC Members/ LLP Partners,<br>Trustees) | <input type="checkbox"/> Issuance/Transfer of Stock/New Stockholder       | <input type="checkbox"/> Change of Hours                              |
|  | <input type="checkbox"/> Other  |   | <input type="checkbox"/> Change of DBA                                |

THE LOCAL LICENSING AUTHORITY MUST MAIL THIS  
TRANSMITTAL FORM ALONG WITH  
COMPLETED APPLICATION, AND SUPPORTING DOCUMENTS TO:

Alcoholic Beverages Control Commission  
95 Fourth Street, Suite 3  
Chelsea, MA 02150-2358

## Payment Confirmation

### YOUR PAYMENT HAS PROCESSED AND THIS IS YOUR RECEIPT

Your account has been billed for the following transaction. You will receive a receipt via email.



**Transaction Processed Successfully.**

**INVOICE #: 91797796-65b4-45e7-b200-f99f0a4bfb50**

Description	Applicant, License or Registration Number	Amount
FILING FEES-RETAIL	00003-RS-0148	\$200.00
		<b>\$200.00</b>

**Total Convenience Fee: \$0.35**

**Date Paid: 12/7/2020 1:00:41 PM EDT**

**Total Amount Paid: \$200.35**

#### Payment On Behalf Of

**License Number or Business Name:**  
00003-RS-0148

**Fee Type:**  
FILING FEES-RETAIL

#### Billing Information

**First Name:**  
steffani

**Last Name:**  
boudreau

**Address:**  
300 Washington

**City:**  
Brookline

**State:**  
MA

**Zip Code:**  
02445

**Email Address:**  
sboudreau@boballenlaw.com

8.A.



**The Commonwealth of Massachusetts**  
**Alcoholic Beverages Control Commission**  
 95 Fourth Street, Suite 3, Chelsea, MA 02150-2358  
 www.mass.gov/abcc

**AMENDMENT-Change of Manager**☒ **Change of License Manager****1. BUSINESS ENTITY INFORMATION**

Entity Name	Municipality	ABCC License Number
CCLH, LLC	BROOKLINE	00003-RS-0148

**2. APPLICATION CONTACT**

The application contact is the person who should be contacted with any questions regarding this application.

Name	Title	Email	Phone
Steffani Boudreau	Attorney	sboudreau@boballenlaw.com	617-383-6000

**3A. MANAGER INFORMATION**

The individual that has been appointed to manage and control of the licensed business and premises.

Proposed Manager Name	Mohamaed Hashesh	Date of Birth	[REDACTED]	SSN	[REDACTED]
Residential Address	[REDACTED]				
Email	mhashesh@brooklineinn.com	Phone	[REDACTED]		
Please indicate how many hours per week you intend to be on the licensed premises	40	Last-Approved License Manager	Anthony Adianto		

**3B. CITIZENSHIP/BACKGROUND INFORMATION**

Are you a U.S. Citizen? ☒ Yes ☐ No \*Manager must be U.S. citizen  
 If yes, attach one of the following as proof of citizenship US Passport, Voter's Certificate, Birth Certificate or Naturalization Papers.  
 Have you ever been convicted of a state, federal, or military crime? ☐ Yes ☒ No  
 If yes, fill out the table below and attach an affidavit providing the details of any and all convictions. Attach additional pages, if necessary, utilizing the format below.

Date	Municipality	Charge	Disposition

**3C. EMPLOYMENT INFORMATION**

Please provide your employment history. Attach additional pages, if necessary, utilizing the format below.

Start Date	End Date	Position	Employer	Supervisor Name
		See Resume attached		

**3D. PRIOR DISCIPLINARY ACTION**

Have you held a beneficial or financial interest in, or been the manager of, a license to sell alcoholic beverages that was subject to disciplinary action? ☐ Yes ☒ No If yes, please fill out the table. Attach additional pages, if necessary,utilizing the format below.

Date of Action	Name of License	State	City	Reason for suspension, revocation or cancellation

I hereby swear under the pains and penalties of perjury that the information I have provided in this application is true and accurate:

 Manager's Signature  Date 12/29/20

**APPLICANT'S STATEMENT**

I, Matthew Kenney the: ☐ sole proprietor; ☐ partner; ☒ corporate principal; ☐ LLC/LLP manager  
 Authorized Signatory

of CCLLH, LLC  
 Name of the Entity/Corporation

hereby submit this application (hereinafter the "Application"), to the local licensing authority (the "LLA") and the Alcoholic Beverages Control Commission (the "ABCC" and together with the LLA collectively the "Licensing Authorities") for approval.

I do hereby declare under the pains and penalties of perjury that I have personal knowledge of the information submitted in the Application, and as such affirm that all statements and representations therein are true to the best of my knowledge and belief. I further submit the following to be true and accurate:

- (1) I understand that each representation in this Application is material to the Licensing Authorities' decision on the Application and that the Licensing Authorities will rely on each and every answer in the Application and accompanying documents in reaching its decision;
- (2) I state that the location and description of the proposed licensed premises are in compliance with state and local laws and regulations;
- (3) I understand that while the Application is pending, I must notify the Licensing Authorities of any change in the information submitted therein. I understand that failure to give such notice to the Licensing Authorities may result in disapproval of the Application;
- (4) I understand that upon approval of the Application, I must notify the Licensing Authorities of any change in the ownership as approved by the Licensing Authorities. I understand that failure to give such notice to the Licensing Authorities may result in sanctions including revocation of any license for which this Application is submitted;
- (5) I understand that the licensee will be bound by the statements and representations made in the Application, including, but not limited to the identity of persons with an ownership or financial interest in the license;
- (6) I understand that all statements and representations made become conditions of the license;
- (7) I understand that any physical alterations to or changes to the size of the area used for the sale, delivery, storage, or consumption of alcoholic beverages, must be reported to the Licensing Authorities and may require the prior approval of the Licensing Authorities;
- (8) I understand that the licensee's failure to operate the licensed premises in accordance with the statements and representations made in the Application may result in sanctions, including the revocation of any license for which the Application was submitted; and
- (9) I understand that any false statement or misrepresentation will constitute cause for disapproval of the Application or sanctions including revocation of any license for which this Application is submitted.
- (10) I confirm that the applicant corporation and each individual listed in the ownership section of the application is in good standing with the Massachusetts Department of Revenue and has complied with all laws of the Commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting of child support.

Signature: 

Date: 12/29/20

Title: Member



**CORPORATE VOTE**

The Board of Directors or LLC Managers of CCLLH, LLC  
Entity Name

duly voted to apply to the Licensing Authority of Brookline and the  
City/Town

Commonwealth of Massachusetts Alcoholic Beverages Control Commission on December 1, 2020  
Date of Meeting

For the following transactions (Check all that apply):

☒ Change of Manager

☐ Other

"VOTED: To authorize

Matthew Kenney

Name of Person

to sign the application submitted and to execute on the Entity's behalf, any necessary papers and do all things required to have the application granted."

"VOTED: To appoint

Mohamed Hashesh

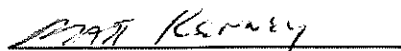
Name of Liquor License Manager

as its manager of record, and hereby grant him or her with full authority and control of the premises described in the license and authority and control of the conduct of all business therein as the licensee itself could in any way have and exercise if it were a natural person residing in the Commonwealth of Massachusetts."

A true copy attest,



Corporate Officer /LLC Manager Signature



(Print Name)

For Corporations ONLY

A true copy attest,

\_\_\_\_\_  
 Corporation Clerk's Signature

\_\_\_\_\_  
 (Print Name)



Commonwealth of Massachusetts  
Alcoholic Beverages Control Commission  
239 Causeway Street, First Floor  
Boston, MA 02114

DEBORAH B. GOLDBERG  
TREASURER AND RECEIVER GENERAL

**CORI REQUEST FORM**

JEAN M. LORIZIO, ESQ.  
CHAIRMAN

The Alcoholic Beverages Control Commission ("ABCC") has been certified by the Criminal History Systems Board to access conviction and pending Criminal Offender Record Information ("CORI"). For the purpose of approving each shareholder, owner, licensee or applicant for an alcoholic beverages license, I understand that a criminal record check will be conducted on me, pursuant to the above. The information below is correct to the best of my knowledge.

**ABCC LICENSE INFORMATION**

ABCC NUMBER:		LICENSEE NAME:		CITY/TOWN:	
--------------	--	----------------	--	------------	--

**APPLICANT INFORMATION**

LAST NAME:	Hashesh	FIRST NAME:	Mohamed	MIDDLE NAME:	Abdel	
MAIDEN NAME OR ALIAS (IF APPLICABLE):			PLACE OF BIRTH:	Cairo, Egypt		
DATE OF BIRTH:		SSN:		ID THEFT INDEX PIN (IF APPLICABLE):		
MOTHER'S MAIDEN NAME:	Mansour	DRIVER'S LICENSE #:		STATE LIC. ISSUED:	Massachusetts	
GENDER:	MALE	HEIGHT:	5	9	WEIGHT:	180
EYE COLOR:	Brown					
CURRENT ADDRESS:						
CITY/TOWN:	Worcester	STATE:	MA	ZIP:	01602	
FORMER ADDRESS:						
CITY/TOWN:	Worcester	STATE:	MA	ZIP:	01602	

**PRINT AND SIGN**

PRINTED NAME:	Mohamed Hashesh	APPLICANT/EMPLOYEE SIGNATURE:	
---------------	-----------------	-------------------------------	--

**NOTARY INFORMATION**

On this 2nd day of October, before me, the undersigned notary public, personally appeared Mohamed Hashesh (name of document signer), proved to me through satisfactory evidence of identification, which were Driver's License to be the person whose name is signed on the preceding or attached document, and acknowledged to me that (he) (she) signed it voluntarily for its stated purpose.

NOTARY MOORE

Notary Public

Commonwealth of Massachusetts

My Commission Expires February 13, 2026

**DIVISION USE ONLY**

APPROVED BY:	
SIGNATURE OF CORP. AUTHORITY/EMPLOYEE:	

The following information is to be completed by those applicants that have been issued an identity theft PIN Number by the DCR. Certified agencies are required to provide an opportunity to include this information to ensure the accuracy of the CORI request process. All CORI request forms that include this field are required to be submitted to the DCR via mail or by fax to 617-624-4514.

**APPENDIX A - CORI Acknowledgment Form**

I am an: (please check one)

Applicant - Position: Managing Director

Department/ License \_\_\_\_\_



Volunteer - Position \_\_\_\_\_

Department \_\_\_\_\_



Employee - Position \_\_\_\_\_

Department \_\_\_\_\_



Contractor - Company Name \_\_\_\_\_

The Town of Brookline is registered under the provisions of M.G.L. c. 6, §172 to receive CORI for the purpose of screening current and otherwise qualified prospective employees, subcontractors, volunteers, license applicants, current licensees, and applicants for the rental or lease of housing. As the prospective or current employee, subcontractor, volunteer, license applicant, current licensee, or applicant for the rental or lease of housing, I understand that a CORI check will be submitted for my personal information to the DCJIS (and in the case of certain license applicants subject to fingerprint-based background checks, to the FBI). I hereby acknowledge and provide permission to The Town of Brookline to submit a CORI check for my information. This authorization is valid for one year from the date of my signature. I may withdraw this authorization at any time by providing The Town of Brookline with written notice of my intent to withdraw consent to a CORI check. For employment, volunteer, and licensing purposes only: The Town of Brookline may conduct subsequent CORI checks within one year of the date this Form was signed by me provided, however, that The Town of Brookline must first provide me with written notice of this check 72 hours in advance. By signing below, I provide my consent to a CORI check and acknowledge that the information provided on this Acknowledgment Form is true and accurate.

Applicant/Employee/Volunteer/Contractor Signature \_\_\_\_\_

11/30/20  
Today's Date**Applicant/Volunteer/Employee/Contractor Information (Please Print)**Last Name: HasheshFirst Name: MohamedMi: ACurrent Address: [REDACTED] Worcester MA 01602Former Address: [REDACTED] Worcester MA 01602

Maiden Name or Alias (If Applicable): \_\_\_\_\_

Place of Birth: Cairo, EgyptDate of Birth: [REDACTED]Last 6 digits of Social Security Number [REDACTED]Sex: MaleHeight: 5 ft 09 in.

Race: \_\_\_\_\_

Eye Color: BrownState Driver's License Number (Include State): [REDACTED]

ID Theft Index PIN\*: \_\_\_\_\_

List any other name(s) or dates of birth that appear in DCJIS's database: \_\_\_\_\_

Mother's Full Maiden Name: Ekram MansourFather's Name: Abdel Hashesh

\*The Identify Theft Index PIN Number is not required and only for those applicants who have been issued an Identify Theft Index PIN Number by the DCJIS. Certified agencies are required to provide all applicants the opportunity to include this information to ensure the Accuracy of the CORI request process

**\*\*\*For Official Use Only\*\*\***

I certify that the foregoing person was identified in conformity with Town Policy using the following form of acceptable \_\_\_\_\_ government-issued identification: (List ID Type)

Signature of CORI-Authorized Employee: \_\_\_\_\_ Date: \_\_\_\_\_

Name and Position of CORI-Authorized Employee: \_\_\_\_\_

**VOTE OF LIMITED LIABILITY COMPANY  
CCLH, LLC**

At a meeting of the members of CCLH, LLC held at 1200 Beacon Street, Brookline, MA on December 3, 2020, it was duly voted that the LLC apply to the Licensing Board of the Town of Brookline and Massachusetts Alcoholic Beverages Control Commission for a Change of Manager for the All Alcoholic Beverages license to be exercised on the premises at 1200 Beacon Street, Brookline, Massachusetts 02446.

The LLC hereby made affirmative votes on the following matters:

“VOTED: To appoint MOHAMED HASHESH as its manager with as full authority and control of the premises described in the license of the LLC and of the conduct of all business therein relative to alcoholic beverages as the licensee itself could in any way have and exercise if it were a natural person resident in the Commonwealth of Massachusetts and that a copy of this vote duly certified by the manager of the LLC and delivered to said manager shall constitute written authority required by Sec. 26, Chapter 138, G.L.”

“VOTED: To authorize MATTHEW KENNEY to sign the application for the license in the name of CCLH, LLC and to execute in its behalf any necessary papers, and to do all things required relative to the granting of the license.”

This is to certify that CCLH, LLC is a foreign limited liability company and duly organized under the laws of the Commonwealth of Massachusetts.

This LLC has NOT been dissolved.

A TRUE COPY ATTEST



MATTHEW KENNEY on behalf of  
CCLH, LLC

Date: December 3, 2020

we the People

Of the United States,  
in Order to form a more perfect Union,  
establish Justice, insure domestic Tranquility,  
provide for the common defense,  
promote the general Welfare, and secure  
the Blessing of Liberty to ourselves and  
our Posterity, do ordain and establish this  
Constitution for the United States of America.



\_\_\_\_\_  
SOTTOSCRITTORE O DEPOSITARIO SOSTITUTO DEL TITOLARE, FIRMA DEL TITOLARE

PASSEPORT  
PASSEPORT  
PASSEPORT

UNITED STATES OF AMERICA

## HASHES

**MOHAMED ABDEL**

UNITED STATES OF AMERICA

FILED IN: 11-10-11 / DATE OF: 11-10-11 / TIME: 1:00 PM / PAGE: 1 OF 1

EGYPT

1994年12月15日

13 Feb 2018

Cost of financing: 0.45 francs per 100 francs of capital

12 Feb 2028

1998, 1999, 2000, 2001, 2002, 2003, 2004, 2005, 2006, 2007, 2008, 2009, 2010, 2011, 2012, 2013, 2014, 2015, 2016, 2017, 2018, 2019, 2020, 2021, 2022, 2023, 2024, 2025, 2026, 2027, 2028, 2029, 2030, 2031, 2032, 2033, 2034, 2035, 2036, 2037, 2038, 2039, 2040, 2041, 2042, 2043, 2044, 2045, 2046, 2047, 2048, 2049, 2050, 2051, 2052, 2053, 2054, 2055, 2056, 2057, 2058, 2059, 2060, 2061, 2062, 2063, 2064, 2065, 2066, 2067, 2068, 2069, 2070, 2071, 2072, 2073, 2074, 2075, 2076, 2077, 2078, 2079, 2080, 2081, 2082, 2083, 2084, 2085, 2086, 2087, 2088, 2089, 2090, 2091, 2092, 2093, 2094, 2095, 2096, 2097, 2098, 2099, 2100, 2101, 2102, 2103, 2104, 2105, 2106, 2107, 2108, 2109, 2110, 2111, 2112, 2113, 2114, 2115, 2116, 2117, 2118, 2119, 2120, 2121, 2122, 2123, 2124, 2125, 2126, 2127, 2128, 2129, 2130, 2131, 2132, 2133, 2134, 2135, 2136, 2137, 2138, 2139, 2140, 2141, 2142, 2143, 2144, 2145, 2146, 2147, 2148, 2149, 2150, 2151, 2152, 2153, 2154, 2155, 2156, 2157, 2158, 2159, 2160, 2161, 2162, 2163, 2164, 2165, 2166, 2167, 2168, 2169, 2170, 2171, 2172, 2173, 2174, 2175, 2176, 2177, 2178, 2179, 2180, 2181, 2182, 2183, 2184, 2185, 2186, 2187, 2188, 2189, 2190, 2191, 2192, 2193, 2194, 2195, 2196, 2197, 2198, 2199, 2200, 2201, 2202, 2203, 2204, 2205, 2206, 2207, 2208, 2209, 2210, 2211, 2212, 2213, 2214, 2215, 2216, 2217, 2218, 2219, 2220, 2221, 2222, 2223, 2224, 2225, 2226, 2227, 2228, 2229, 2230, 2231, 2232, 2233, 2234, 2235, 2236, 2237, 2238, 2239, 2240, 2241, 2242, 2243, 2244, 2245, 2246, 2247, 2248, 2249, 2250, 2251, 2252, 2253, 2254, 2255, 2256, 2257, 2258, 2259, 2260, 2261, 2262, 2263, 2264, 2265, 2266, 2267, 2268, 2269, 2270, 2271, 2272, 2273, 2274, 2275, 2276, 2277, 2278, 2279, 2280, 2281, 2282, 2283, 2284, 2285, 2286, 2287, 2288, 2289, 2290, 2291, 2292, 2293, 2294, 2295, 2296, 2297, 2298, 2299, 2300, 2301, 2302, 2303, 2304, 2305, 2306, 2307, 2308, 2309, 2310, 2311, 2312, 2313, 2314, 2315, 2316, 2317, 2318, 2319, 2320, 2321, 2322, 2323, 2324, 2325, 2326, 2327, 2328, 2329, 2330, 2331, 2332, 2333, 2334, 2335, 2336, 2337, 2338, 2339, 2340, 2341, 2342, 2343, 2344, 2345, 2346, 2347, 2348, 2349, 2350, 2351, 2352, 2353, 2354, 2355, 2356, 2357, 2358, 2359, 2360, 2361, 2362, 2363, 2364, 2365, 2366, 2367, 2368, 2369, 2370, 2371, 2372, 2373, 2374, 2375, 2376, 2377, 2378, 2379, 2380, 2381, 2382, 2383, 2384, 2385, 2386, 2387, 2388, 2389, 2390, 2391, 2392, 2393, 2394, 2395, 2396, 2397, 2398, 2399, 2400, 2401, 2402, 2403, 2404, 2405, 2406, 2407, 2408, 2409, 2410, 2411, 2412, 2413, 2414, 2415, 2416, 2417, 2418, 2419, 2420, 2421, 2422, 2423, 2424, 2425, 2426, 2427, 2428, 2429, 2430, 2431, 2432, 2433, 2434, 2435, 2436, 2437, 2438, 2439, 2440, 2441, 2442, 2443, 2444, 2445, 2446, 2447, 2448, 2449, 2450, 2451, 2452, 2453, 2454, 2455, 2456, 2457, 2458, 2459, 2460, 2461, 2462, 2463, 2464, 2465, 2466, 2467, 2468, 2469, 2470, 2471, 2472, 2473, 2474, 2475, 2476, 2477, 2478, 2479, 2480, 2481, 2482, 2483, 2484, 2485, 2486, 2487, 2488, 2489, 2490, 2491, 2492, 2493, 2494, 2495, 2496, 2497, 2498, 2499, 2500, 2501, 2502, 2503, 2504, 2505, 2506, 2507, 2508, 2509, 2510, 2511, 2512, 2513, 2514, 2515, 2516, 2517, 2518, 2519, 2520, 2521, 2522, 2523, 2524, 2525, 2526, 2527, 2528, 2529, 2530, 2531, 2532, 2533, 2534, 2535, 2536, 2537, 2538, 2539, 2540, 2541, 2542, 2543, 2544, 2545, 2546, 2547, 2548, 2549, 2550, 2551, 2552, 2553, 2554, 2555, 2556, 2557, 2558, 2559, 2560, 2561, 2562, 2563, 2564, 2565, 2566, 2567, 2568, 2569, 2570, 2571, 2572, 2573, 2574, 2575, 2576, 2577, 2578, 2579, 2580, 2581, 2582, 2583, 2584, 2585, 2586, 2587, 2588, 2589, 2590, 2591, 2592, 2593, 2594, 2595, 2596, 2597, 2598, 2599, 2600, 2601, 2602, 2603, 2604, 2605, 2606, 2607, 2608, 2609, 2610, 2611, 2612, 2613, 2614, 2615, 2616, 2617, 2618, 2619, 2620, 2621, 2622, 2623, 2624, 2625, 2626, 2627, 2628, 2629, 2630, 2631, 2632, 2633, 2634, 2635, 2636, 2637, 2638, 2639, 2640, 2641, 2642, 2643, 2644, 2645, 2646, 2647, 2648, 2649, 2650, 2651, 2652, 2653, 2654, 2655, 2656, 2657, 2658, 2659, 2660, 2661, 2662, 2663, 2664, 2665, 2666, 2667, 2668, 2669, 2670, 2671, 2672, 2673, 2674, 2675, 2676, 2677, 2678, 2679, 26

SEE PAGE 27

Ex: 1. 1985, 1986

14

Approved: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

United States

Department of State

USA

P<USAHASHESH<<MORAMED<ABDEL<<<<<<<<<<<<<<<<<<<



LICENSE INTERVIEW FORM

TYPE OF LICENSE APPLYING FOR: Liquor License

NAME: Mohamed Hashesh

ADDRESS: [REDACTED]

EMAIL ADDRESS: mhashesh@brooklineinn.com

PHONE #: [REDACTED]

PLACE OF BIRTH: Cairo, Egypt

FATHER'S NAME: Abdel HAshesh

MOTHER'S MAIDEN NAME: Ekram Mansour

ARE YOU A CITIZEN? YES ☒ NO ☐ ALIEN CARD # \_\_\_\_\_

ARE YOU A VETERAN: YES ☐ NO ☒

RESIDENCES FOR LAST FIVE YEARS

DATE: 12/2019 LOCATION: [REDACTED] chester MA

DATE: 05/2019 LOCATION: [REDACTED] chester MA

DATE: 1/2017 LOCATION: [REDACTED] Durham NC

DATE: 07/2014 LOCATION: [REDACTED] re MA

DATE: \_\_\_\_\_ LOCATION: \_\_\_\_\_

EDUCATION

DATE: 05/2002 LOCATION: American University in Cairo

DATE: LOCATION:

DATE: LOCATION:

DATE: LOCATION:

EMPLOYMENT HISTORY

DATE: 04/2019-Present LOCATION: Cambridge Courtyard POSITION: Managing Director

DATE: 8/2013-4/2019 LOCATION: Shaner Hotels POSITION: General Manager

DATE: 2/2011-7/2013 LOCATION: Revere Hotel POSITION: Director of Room

DATE: 1/2008-2/2011 LOCATION: Liberty Hotel POSITION: Director of House

DATE: LOCATION: POSITION

SIGNATURE:  DATE: 11/30/20

(PLEASE SUBMIT THREE CHARACTER REFERENCES WITH APPLICATION)

## Mohamed Hashesh

### Hotel General Management

Result-oriented and dedicated business professional with demonstrated success in general management within the hospitality industry. History of providing effective leadership with focus on total organizational coordination to efficiently manage operations, provide innovative concepts, supervise high performing teams, and oversee staff. Extensive background in accounting and P&L, with the proven ability to control cost and positively impact the bottom line. Track record of exceeding goals, boosting sales, and increasing revenue without compromising customer service.

### Experience

**Highgate Hotels- Complex Managing Director**

**April 2019 -Present**

### Cambridge Courtyard by Marriott

Ensuring each and every guest have a great experience in a 216-room full service hotel through 85 union employees. Administer operating and capital budgets and manage strategic operations of the hotel to ensure profitability and return on owner investment.

### The INN at Brookline

Managing a 226 room independent non-union property in the heart of Brookline. Managing renovation, rebranding, and restructuring of the property.

### Shaner Hotels- Durham Marriott City Center

**General Manager**                      **August 2013- April 2019**

\* Task Force General Manager for Marriott Chattanooga Downtown

\* Task Force General Manager for French Leave Resort Eleuthera Autograph Collection

\* Task Force General Manager for Buffalo Marriott Harbor Center in Buffalo New York.

\* Task Force General Manager for Courtyard Marriott Glassboro, New Jersey

\* Director of Operations for Southbridge Hotel and Conference Center

**Revere Hotel Boston Common, 200 Stuart St. Boston, Ma- Director of Rooms**  
**July 2013**

**February 2011 to**



## 8.A.

**Liberty Hotel, 215 Charles St Boston, Ma- Director of Housekeeping**  
**February 2011**

**January 2008 to**

### **Education**

**American University of Cairo**

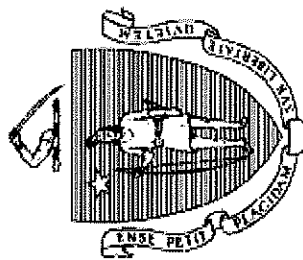
**September 2002- May 2006**

# *Commonwealth of Massachusetts*

*Executive Office of Public Safety and Security*

*Department of Fire Services*

*Office of the State Fire Marshal*



## **Certificate of Completion**

*This certifies that*

Hashesh Mohamed

*Successfully completed the Crowd Manager Training Program  
In accordance with 527 CMR 1.00:20.1.5.6 - Designation of a Crowd Manager*

Date issued: December 14, 2020

Expires: December 14, 2023

Certificate #: gFMEmleYgX3gTQ

**Peter Ostroskey**

State Fire Marshal

# Certificate of Completion

This Certificate of Completion of  
**eTIPS On Premise 3.0**  
For coursework completed on July 29, 2019  
provided by Health Communications, Inc.  
is hereby granted to:

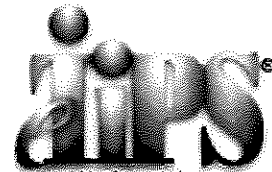
**Mohamed Hashesh**

Certification to be sent to:

**777 Memorial Dr  
Cambridge MA, 02139-4614 USA**



HEALTH COMMUNICATIONS, INC.



This document is not proof of TIPS certification. It signifies only that you have completed the course. Valid certification documents will be forwarded to you.

Courtyard by Marriott®  
Boston Cambridge

777 Memorial Drive  
Cambridge, MA 02139  
T 617.492.7777 F 617.492.6038  
courtyard.com/boscy



To Whom It May Concern:

Mohamed Hashesh began his employment with Highgate Hotels in May 2019. He worked his way up through the years to become Managing Director of multiple properties. He is reliable, trustworthy and dedicated. I am always confident that the hotel/restaurant is in safe hands with Mohamed at the helm.

Mohamed is responsible and quick to act when situations arise. He has successfully completed the TIPS alcohol training, Choke Save and Crowd Control certifications classes. Having begun his career as a Director of Operations, Mohamed has a full understanding of both the back and front of the "house" with regards to the sale and consumption of alcoholic beverages. This understanding makes him equipped to handle all manner of situations effectively and confidently. I am confident that he fully grasps the weight of this responsibility and abides by all local and state regulations.

Please feel free to reach out to me with any further questions that you may have.

A handwritten signature in black ink, appearing to read "Mychal Kiley".

MYCHAL KILEY  
AREA DIRECTOR OF FINANCE  
M 401.226.6055

777 Memorial Drive  
Cambridge, MA.02139

COURTYARD  
BY MARRIOTT

Date: - Dec 4, 2020

To Whom It May Concern:

*Mohamed Hashesh began his employment with Highgate Hotels in May 2019. He worked his way up through the years to become Managing Director. He is reliable, trustworthy and dedicated. I am always confident that the hotel/restaurant is in safe hands with Mohamed at the helm.*

*Mohamed is responsible and quick to act when situations arise. He has successfully completed the TIPS alcohol training, Choke Save and Crowd Control certifications classes. Having begun his career as a Director of Operations, Mohamed has a full understanding of both the back and front of the "house" about the sale and consumption of alcoholic beverages. This understanding makes him equipped to handle all manner of situations effectively and confidently. I am confident that he fully grasps the weight of this responsibility and abides by all local and state regulations.*

*Please feel free to reach out to me with any further questions that you may have.*

*Best Regards,*

*Juzar Shakir  
Director of Sales and Marketing*

# BOSTON PARK PLAZA

EST. 1927

December 3, 2020

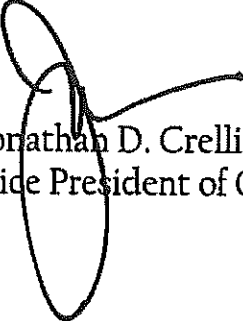
To Whom It May Concern:

Mohamed Hashesh began his employment with Highgate Hotels in May 2019. He worked his way up through the years to become Managing Director of the Inn at Brookline. He is reliable, trustworthy and dedicated. I am always confident that the hotel/restaurant is in safe hands with Mohamed at the helm.

Mohamed is responsible and quick to act when situations arise. He has successfully completed the TIPS alcohol training, Choke Save and Crowd Control certifications classes. With regard to the sale and consumption of alcoholic beverages, Mohamed has a full understanding of both the back and front of the "house" operation. This understanding makes him equipped to handle all manner of situations effectively and confidently. I am confident that he fully grasps the weight of this responsibility and abides by all local and state regulations.

Please feel free to reach out to me at (617) 756-3697 or via email at [jcrellin@bostonparkplaza.com](mailto:jcrellin@bostonparkplaza.com) with any questions.

Sincerely,



Jonathan D. Crellin  
Vice President of Operations and Managing Director

## **Change of D/B/A**

Applicant: SLH Restaurant LLC  
DBA: Vello Restaurant Bar  
Location: 404 Harvard Street, Brookline, MA 02446  
Application Details: Change of D/B/A

### **Application Details:**

Question of approving the application for a change in D/B/A at 404 Harvard Street.

From  
SLH Restaurant LLC. d/b/a Brothers Restaurant.

To  
SLH Restaurant LLC. d/b/a Vello Restaurant Bar.

### **Reports (Attached):**

Police Department (Approved)



## BROOKLINE POLICE DEPARTMENT

*Brookline, Massachusetts*

MARK P. MORGAN  
ACTING CHIEF OF POLICE

TO: Chief Mark P. Morgan

FROM: Lt. Michael P. Murphy #31

DATE: 5 February 2021

RE: Change of Name: SLH Restaurants, LLC d/b/a The Brothers Restaurants at 404 Harvard St., Brookline, MA. to a new d/b/a Vello Restaurant & New CV License

---

Sir,

SLH Restaurants, LLC d/b/a The Brothers Restaurants, has submitted an application for a change of name to d/b/a Vello Restaurant. They are currently located at 404 Harvard St., Brookline, MA.

SLH Restaurants, LLC d/b/a The Brothers Restaurants has also requested new serving hours on their Common Victualler License. The new proposed times for the seventy-four (74) indoor seat restaurant are Monday to Sunday 7:00 am to 12:00 am.

All paperwork appears in order and I see no reason to deny these requests.

Respectfully submitted,  
Lt. Michael P. Murphy #31



Public Safety Building, 350 Washington Street, Brookline, Massachusetts 02445  
Telephone (617) 730-2249 ♦ Facsimile (617) 730-8454





OFFICE OF SELECT BOARD  
333 WASHINGTON STREET  
BROOKLINE, MA 02445  
(617) 730-2200

**APPLICATION FOR CHANGE IN D/B/A**  
**COMMON VICTUALLER LICENSES**

DATE: 01/21/21  
LOCATION: 404 Harvard Street, Brookline, MA  
APPLICANT: SLH Restaurant LLC  
INDIVIDUAL/PARTNERSHIP/CORPORATION  
PRESENT D/B/A: Brothers Restaurant  
PROPOSED D/B/A: Vello Restaurant Bar

(NOTE: CHANGE OF D/B/A FOR LIQUOR LICENSEES REQUIRES SUBMISSION OF APPLICATION FOR CHANGE IN D/B/A ON LIQUOR LICENSE IN ADDITION TO THIS APPLICATION FOR CHANGE OF D/B/A ON CV LICENSE.)

APPLICANT SIGNATURE: *Seyon Kesh* TITLE: Manager PHONE: [REDACTED]  
EMAIL ADDRESS: exitomultiservice@gmail.com

VOTE OF CORPORATIONDATE: 01/21/21AT A MEETING OF THE BOARD OF DIRECTORS OF SLH Restaurant LLCHELD AT: 404 Harvard St., Brookline, MA ON: 01/21/21

IT WAS DULY VOTED THAT THE CORPORATION APPLY TO THE LICENSING BOARD FOR THE TOWN OF BROOKLINE FOR A

Application for Change of DBA

(TYPE OF LICENSE)

FOR THE YEAR 2021 TO BE EXERCISED ON THE PREMISES LOCATED AT  
404 Harvard StreetVOTED: TO AUTHORIZE Simon Restrepo TO  
SIGNTHE APPLICATION FOR THE LICENSES IN THE NAME OF SLH Restaurant LLCAND TO EXECUTE ON ITS  
BEHALF ANY NECESSARY PAPERS, AND TO DO ALL THINGS REQUIRED RELATIVE TO THE  
GRANTING OF THE LICENSE.

THIS CORPORATION HAS \_\_\_\_\_ BEEN RESOLVED.

A TRUE COPY

ATTEST:

CLERK

STATE TAX VERIFICATION FORM

I certify under the penalties of perjury that I, to my best knowledge and belief, have filed all state tax returns and paid all state taxes as required under law.

\*Signature of Individual

By: Corporate Officer



\*\* Social Security #

Voluntary or Federal ID #

\*This license will not be issued unless this certification clause is signed by the applicant.

\*\*Your social security number will be furnished to the Massachusetts Department of Revenue to determine whether you have met tax filing or tax payment obligations. Licensees who fail to correct their non-filing or delinquency will be subject to license suspension or revocation. This request is made under the authority of Massachusetts General Law Chapter 62C, Section 49A.

The Commonwealth of Massachusetts  
Alcoholic Beverages Control Commission  
239 Causeway Street  
Boston, MA 02114  
[www.mass.gov/abcc](http://www.mass.gov/abcc)

[Print Form](#)

**RETAIL ALCOHOLIC BEVERAGES LICENSE APPLICATION  
MONETARY TRANSMITTAL FORM**

APPLICATION SHOULD BE COMPLETED ON-LINE, PRINTED, SIGNED, AND SUBMITTED TO THE  
LOCAL LICENSING AUTHORITY.

REVENUE CODE: RETA

CHECK PAYABLE TO ABCC OR COMMONWEALTH OF MA: NO FEE

A.B.C.C. LICENSE NUMBER (IF AN EXISTING LICENSEE, CAN BE OBTAINED FROM THE CITY):

05859-RS-0148

LICENSEE NAME: SLH Restaurant LLC

ADDRESS: 404 Harvard Street

CITY/TOWN: Brookline

STATE MA

ZIP CODE 02446

**TRANSACTION TYPE (Please check all relevant transactions):**

☐ Change of Hours

☒ Change of DBA

THE LOCAL LICENSING AUTHORITY MUST MAIL THIS TRANSMITTAL  
FORM ALONG WITH THE CHECK, COMPLETED APPLICATION, AND  
SUPPORTING DOCUMENTS TO:

**ALCOHOLIC BEVERAGES CONTROL COMMISSION  
P. O. BOX 3396  
BOSTON, MA 02241-3396**



*The Commonwealth of Massachusetts*  
**Alcoholic Beverages Control Commission**  
 95 Fourth Street, Suite 3, Chelsea, MA 02150-2358  
[www.mass.gov/abcc](http://www.mass.gov/abcc)

**APPLICATION FOR AMENDMENT-Change of Business Entity Information**

☐ **Change of Corporate Name**

☒ **Change of DBA**

- DOR Certificate of Good Standing (Req. for Chg of Corp Name only)
- DUA Certificate of Compliance (Req. for Chg of Corp Name only)
- Change of Corporate Name/DBA Application
- Vote of the Entity
- Payment Receipt (Req. for Chg of Corp Name only)
- Business Structure Documents
  - If Sole Proprietor, **Business Certificate**
  - If partnership, **Partnership Agreement**
  - If corporation or LLC, **Articles of Organization** from the Secretary of the Commonwealth

☐ **Change of Corporate Structure**

- DOR Certificate of Good Standing
- DUA Certificate of Compliance
- Change of Corporate Structure Application
- Vote of the Entity
- Payment Receipt
- Business Structure Documents
  - If Sole Proprietor, **Business Certificate**
  - If partnership, **Partnership Agreement**
  - If corporation or LLC, **Articles of Organization** from the Secretary of the Commonwealth

**1. BUSINESS ENTITY INFORMATION**

Entity Name	Municipality	ABCC License Number
SLH Restaurant LLC	Brookline	05859-RS-0148

Please provide a narrative overview of the transaction(s) being applied for.

Change of DBA.

**APPLICATION CONTACT**

The application contact is the person who should be contacted with any questions regarding this application.

Name	Title	Email	Phone
Frank Ravinal	Attorney	fravinal@ksrlawfirm.com	781-418-5114

**2. CHANGES TO BUSINESS ENTITY INFORMATION**

<b><u>2a. Change of Corporate Name</u></b>	Last-Approved Corporate Name:	<div style="border: 1px solid black; height: 20px;"></div>
	Requested New Corporate Name:	<div style="border: 1px solid black; height: 20px;"></div>
<b><u>2b. Change of DBA</u></b>	Last-Approved DBA:	Brothers Restaurant
	Requested New DBA:	Vello Restaurant Bar
<b><u>2c. Change of Corporate Structure</u></b>	Last-Approved Corporate Structure	<div style="border: 1px solid black; height: 20px;"></div>
LLC, Corporation, Sole Proprietor, etc	Requested New Corporate Structure	<div style="border: 1px solid black; height: 20px;"></div>

Signature:

*Frank Ravinal*

Date: 01/21/21

Title:

Manager

APPLICANT'S STATEMENT

I, Simon Restrepo the: ☐ sole proprietor; ☐ partner; ☐ corporate principal; ☒ LLC/LLP manager  
 Authorized Signatory

of SLH Restaurant LLC  
 Name of the Entity/Corporation

hereby submit this application (hereinafter the "Application"), to the local licensing authority (the "LLA") and the Alcoholic Beverages Control Commission (the "ABCC" and together with the LLA collectively the "Licensing Authorities") for approval.

I do hereby declare under the pains and penalties of perjury that I have personal knowledge of the information submitted in the Application, and as such affirm that all statements and representations therein are true to the best of my knowledge and belief. I further submit the following to be true and accurate:

- (1) I understand that each representation in this Application is material to the Licensing Authorities' decision on the Application and that the Licensing Authorities will rely on each and every answer in the Application and accompanying documents in reaching its decision;
- (2) I state that the location and description of the proposed licensed premises are in compliance with state and local laws and regulations;
- (3) I understand that while the Application is pending, I must notify the Licensing Authorities of any change in the information submitted therein. I understand that failure to give such notice to the Licensing Authorities may result in disapproval of the Application;
- (4) I understand that upon approval of the Application, I must notify the Licensing Authorities of any change in the ownership as approved by the Licensing Authorities. I understand that failure to give such notice to the Licensing Authorities may result in sanctions including revocation of any license for which this Application is submitted;
- (5) I understand that the licensee will be bound by the statements and representations made in the Application, including, but not limited to the identity of persons with an ownership or financial interest in the license;
- (6) I understand that all statements and representations made become conditions of the license;
- (7) I understand that any physical alterations to or changes to the size of the area used for the sale, delivery, storage, or consumption of alcoholic beverages, must be reported to the Licensing Authorities and may require the prior approval of the Licensing Authorities;
- (8) I understand that the licensee's failure to operate the licensed premises in accordance with the statements and representations made in the Application may result in sanctions, including the revocation of any license for which the Application was submitted; and
- (9) I understand that any false statement or misrepresentation will constitute cause for disapproval of the Application or sanctions including revocation of any license for which this Application is submitted.
- (10) I confirm that the applicant corporation and each individual listed in the ownership section of the application is in good standing with the Massachusetts Department of Revenue and has complied with all laws of the Commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting of child support.

Signature:

Simon Restrepo

Date:

01/21/21

Title:

Manager

**CORPORATE VOTE**

The Board of Directors or LLC Managers of

SLH Restaurant LLC

Entity Name

duly voted to apply to the Licensing Authority of

Brookline

City/Town

and the

Commonwealth of Massachusetts Alcoholic Beverages Control Commission on

01/21/21

Date of Meeting

For the following transactions (Check all that apply):

☐ Change Corporate Name☐ Change Corporate Structure (i.e. Corp / LLC)☒ Change of DBA☐ Other

"VOTED: To authorize

Simon Restrepo

Name of Person

to sign the application submitted and to execute on the Entity's behalf, any necessary papers and do all things required to have the application granted."

A true copy attest,

For Corporations ONLY

A true copy attest,

\_\_\_\_\_  
Corporate Officer /LLC Manager Signature\_\_\_\_\_  
Corporation Clerk's Signature\_\_\_\_\_  
(Print Name)\_\_\_\_\_  
(Print Name)

## **Change of Hours**

Applicant: SLH Restaurant LLC  
DBA: Brothers Restaurant / Vello  
Location: 404 Harvard Street

### **Application Details:**

Question of approving the application for a change in hours at 404 Harvard Street

From:

Monday to Thursday 11:00AM – 10:00PM, Friday 11:00AM – 11:00PM, Saturday 7:00AM – 11:00PM and Sunday 7:00AM – 10:00PM

To:

Monday - Sunday 7:00AM – 12:00AM

(Supporting documentation showing approved hours of previous owner)

### **Reports (Attached):**

Police Department (Approved)





## BROOKLINE POLICE DEPARTMENT

*Brookline, Massachusetts*

MARK P. MORGAN  
ACTING CHIEF OF POLICE

TO: Chief Mark P. Morgan

FROM: Lt. Michael P. Murphy #31

DATE: 5 February 2021

RE: Change of Name: SLH Restaurants, LLC d/b/a The Brothers Restaurants at 404 Harvard St., Brookline, MA. to a new d/b/a Vello Restaurant & New CV License

---

Sir,

SLH Restaurants, LLC d/b/a The Brothers Restaurants, has submitted an application for a change of name to d/b/a Vello Restaurant. They are currently located at 404 Harvard St., Brookline, MA.

SLH Restaurants, LLC d/b/a The Brothers Restaurants has also requested new serving hours on their Common Victualler License. The new proposed times for the seventy-four (74) indoor seat restaurant are Monday to Sunday 7:00 am to 12:00 am.

All paperwork appears in order and I see no reason to deny these requests.

Respectfully submitted,  
Lt. Michael P. Murphy #31





OFFICE OF SELECT BOARD  
333 WASHINGTON STREET  
BROOKLINE, MA 02445  
(617) 730-2200

CHANGE OF HOURS APPLICATION  
COMMON VICTUALLERS

DATE: February 5, 2021

LOCATION: 404 Harvard Street

APPLICANT: SLH Restaurant LLC

INDIVIDUAL/PARTNERSHIP/CORPORATION

D/B/A: Brothers Restaurant

CURRENT HOURS OF OPERATION:

DAYS: Monday-Thursday HOURS: 11:00 AM - 10:00 PM

DAYS: Friday HOURS: 11:00 AM - 11:00 PM

Saturday 7:00 AM - 11:00 PM

DAYS: Sunday HOURS: 7:00 AM - 10:00 PM

PROPOSED HOURS OF OPERATION:

\* DAYS: Monday-Sunday HOURS: 7:00 AM - 12:00 AM

\* Seek to keep same hours as permitted under prior license in order to serve  
DAYS: breakfast HOURS: \_\_\_\_\_

DAYS: \_\_\_\_\_ HOURS: \_\_\_\_\_

PLEASE NOTE: CHANGES IN HOURS OF ALCOHOL SERVICE REQUIRE SEPARATE APPLICATION.

APPLICANT SIGNATURE [Signature] TITLE: Manager PHONE# [Redacted]

EMAIL ADDRESS: exitomultiservice@gmail.com

Additional Documents of previous approval of hours

## 9.A.

In Board of Selectmen  
Tuesday, September 30, 2014  
Page 18 of 25

d/b/a 16 Handles, Kush Patel, Owner, holder of a Common Victualler license at 1309 Beacon Street for an Entertainment license to include Radio.

Applicant Kush Patel stated that he is looking to purchase the existing establishment. No changes are being made, and because this is a franchise he will stick to same menu and operations.

All papers are in order. All conditions apply.

On motion it was,

Voted to approve the application of Brookline Frozen Yogurt, Inc., d/b/a 16 Handles, Kush Patel, Owner, for a Common Victualler license at 1309 Beacon Street.

Voted to approve the application of Brookline Frozen Yogurt, Inc., d/b/a 16 Handles, Kush Patel, Owner, holder of a Common Victualler license at 1309 Beacon Street for an Entertainment license to include Radio.

Aye: Kenneth Goldstein, Nancy Daly, Betsy DeWitt, Neil Wishinsky, Benjamin J. Franco

### COMMON VICTUALLER LICENSE/ENTERTAINMENT LICENSE ALL KINDS LIQUOR LICENSE - TRANSFER

Question of approving the application of The Brothers Restaurant Corp., d/b/a The Brothers Restaurant, Concepcion Perez, President for a Common Victualler license at 404 Harvard Street.

Question of approving the application of The Brothers Restaurant Corp., d/b/a The Brothers Restaurant, Concepcion Perez, Owner, holder of Common Victualler License at 404 Harvard Street for an Entertainment License to include: Radio, TV and Taped Music.

Public Hearing on the application of Khayam, Inc., d/b/a Khayam Restaurant, Aliereza Zarifiannazarlo, President holder of an All Kinds of Alcoholic Beverages License as a Common Victualler 404 Harvard Street for the transfer of said license to The Brothers Restaurant Corp., d/b/a The Brothers Restaurant, Concepcion Perez, President.

Attorney Adam Barnosky on behalf of The Brothers Restaurant Corp was present with applicant with Concepcion Perez. The layout of the restaurant will remain the same as the previous restaurant. Mr. Perz gave a brief outline of his qualifications. He holds the required certificates.

Public Hearing: Howard Renick owner of property spoke in favor of the applicant, and said that

In Board of Selectmen  
Tuesday, September 30, 2014  
Page 19 of 25

during his tenant interview process he has found the applicant to be an honorable candidate.

Hearing closed.

On motion it was,

Voted to approve the application of The Brothers Restaurant Corp., d/b/a The Brothers Restaurant, Concepcion Perez, President for a Common Victualler license at 404 Harvard Street.

Voted to approve the application of The Brothers Restaurant Corp., d/b/a The Brothers Restaurant, Concepcion Perez, Owner, holder of Common Victualler License at 404 Harvard Street for an Entertainment License to include: Radio, TV and Taped Music.

Voted to approve the application of Khayam, Inc., d/b/a Khayam Restaurant, Aliereza Zarifiannazarlo, President holder of an All Kinds of Alcoholic Beverages License as a Common Victualler 404 Harvard Street for the transfer of said license to The Brothers Restaurant Corp., d/b/a The Brothers Restaurant, Concepcion Perez, President.

*\* Subject to all conditions and final Fire Prevention inspection before opening*

Aye: Kenneth Goldstein, Nancy Daly, Betsy DeWitt, Neil Wishinsky, Benjamin J. Franco

#### COMMON VICTUALLER LICENSE/WINE AND MALT BEVERAGES LICENSE

Question of approving the application of UC Brookline, LLC d/b/a The Upper Crust, Steven Leese, LLC Manager for a Common Victualler license at 286 Harvard Street.

Public Hearing on the application of Coleman, Inc., d/b/a The Upper Crust, Jordan Tobins, President, holder of a Wine and Malt Beverages License as a Common Victualler at 286 Harvard Street for the transfer of said license to UC Brookline, LLC d/b/a The Upper Crust, Steven Leese, LLC Manager.

Attorney Karen Simao and applicant Shawn Shenefield were present. Attorney Simao reviewed the transfer of the existing Common Victualler and wine and malt beverage license. There will be no change to the day-to-day operations or the current employees. It will be a seamless transition. This is the product of a secured party sale and is not part of the bankruptcy. Mr. Sheenfield has been instrumental and will initially be on as manager of record, with a change of manger in the future, Ms. Simao reviewed the corporate structure.

Public Hearing: No speakers



## BROOKLINE POLICE DEPARTMENT

*Brookline, Massachusetts*

DANIEL C. O'LEARY  
CHIEF OF POLICE

To: Chief Daniel O'Leary

From: Lieutenant Derek Hayes

Re: The Brothers Restaurant Corp, d/b/a The Brothers Restaurant  
Application for a license transfer

Date: September 22, 2014

---

Sir,

On behalf The Brothers Restaurant Corp, d/b/a The Brothers Restaurant, President, Concepcion Perez has applied for a transfer of a section 12 licenses to Expose, Keep for Sale and to Sell All Kinds of Alcoholic Beverages as a Seven Day CV and Entertainment License at 455 Harvard St. This location is presently occupied by Khayam, INC.

The Brothers Restaurant is intended to be a seventy four (74) seat restaurant with 66 seats located inside and 8 seats outside. They will be serving variety of cuisine to include pastas, burgers and pizza. Their proposed hours of operation for liquor service are Sunday noon-12mid, Monday-Saturday 10am-12mid. Their hours of operation for food service are Sunday-Saturday 7am - 12mid. A copy of their lease indicating that they can legally occupy the space at 455 Harvard St. has been submitted. Only aesthetic renovations will be made to the existing space.

The members of the LLC or those with financial interest in the new business are:

1. Concepcion Perez – 100% owner, Pres., Sec., Tres., Dir., & Manager of Record



Public Safety Building 350 Washington Street, Brookline, Massachusetts 02445  
Telephone (617) 730-2249 ♦ Facsimile (617) 730-8454

Mr. Perez does not currently have a financial interest in any other liquor license. According to the application, he did have a financial interest in a liquor license in Cambridge MA up until 2006. The business was called Il Calcio and was located at 1 Kendal Square in Cambridge. I called and spoke to the licensing agency in Cambridge. They have yet to get back to me with any issues. I have been in contact with them via email and if they report any issue, a supplemental report will be submitted.

The Brothers Restaurant Corp is requesting that the Board approve Concepcion Perez as the manger of record for The Brothers Restaurant. Concepcion Perez has worked in the capacity of a head chef for the past ten years. Concepcion Perez has successfully completed his in-person course in the safe service of alcohol. His certification has been submitted. He is a US citizen over the age of 21 years. A copy of his US passport was submitted. Concepcion Perez has a 100% ownership in the business. According to the application, he has never been a manager of record that of a license to sell alcoholic beverages that has been suspended, revoked or cancelled.

A meeting was held on September 17<sup>th</sup>, 2014 at the Brookline Police Station. Concepcion Perez along with other new licensees was present at the meeting. During this meeting I discussed the liquor regulations and went over what was expected during an administrative inspection. I gave them a written document outlining the requirements that we discussed. They were also given a copy of the Town of Brookline's Sale of Alcoholic Beverages Regulations. During this meeting we discussed the requirements for needing a Crowd Manager. The Brothers Restaurant will have a bar for customers to order drinks from and as such they will be required to have a Crowd Manager on site at all times. A copy of Mr. Perez's Crowd Manager Certificate was submitted.

Concepcion Perez submitted a full set of finger prints taken by the Brookline Police Department for the purpose of conducting a State and National criminal record background check. The results of those queries have not come back from the State at this time. If information is received that would disqualify Concepcion Perez, a supplemental report will be submitted. Queries were conducted of other law enforcement databases and they revealed no disqualifying information.

The Brothers Restaurant Corp. filed Articles of Organization with the Secretary of the Commonwealth, Corporate Division on 07-09-14.

The purchase price for business is \$195,000, of which \$75,000 will be financed by the seller; three year promissory note with five percent interest. An Asset Purchase Agreement was submitted. Mr. Perez is not looking to Pledge the liquor license.

An entertainment Application was submitted. They are requesting Radio, Taped Music and Television during their operating hours.



## 9.A.

I find no reason to deny the transfer of the liquor license or to deny the CV and entertainment licenses. I also find no reason to deny the approval of Concepcion Perez to be named as the Manager of Record.

Respectfully Submitted,

Lieutenant Derek Hayes



Public Safety Building 350 Washington Street, Brookline, Massachusetts 02445  
Telephone (617) 730-2249 ♦ Facsimile (617) 730-8454





OFFICE OF SELECTMEN  
333 WASHINGTON STREET  
BROOKLINE, MA 02445  
(617) 730-2200

# APPLICATION FOR COMMON VICTUALLER LICENSE

DATE: \_\_\_\_\_

LOCATION: 404 Harvard Street, Brookline MA, 02446

APPLICANT: The Brothers Restaurant Corp.

INDIVIDUAL/PARTNERSHIP/CORPORATION

D/B/A: The Brothers Restaurant

## BUSINESS OWNERSHIP- INDIVIDUAL/PARTNERS/CORPORATE OFFICERS:

Concepcion Perez President

NAME	TITLE	EMAIL ADDRESS
[REDACTED]		

TELEPHONE #

ADDRESS

NAME	TITLE	EMAIL ADDRESS
[REDACTED]		

TELEPHONE #

ADDRESS

NAME

TITLE

EMAIL ADDRESS

TELEPHONE #

ADDRESS

HAVE YOU PREVIOUSLY HELD A COMMON VICTUALLER LICENSE IN BROOKLINE/ELSEWHERE? Yes  
 IF YES, LOCATION: AND DATES: Il Calcio- 1 Kendall Square, Cambridge MA 02130  
2006.

IF NOT, DO YOU HAVE PRIOR EXPERIENCE IN THE FOOD SERVICE BUSINESS: \_\_\_\_\_  
 IF YES, LOCATION: AND DATES: \_\_\_\_\_

**HOURS OF OPERATION FOR FOOD SERVICE:**

DAYS: Sunday-Saturday HOURS: 7AM- 12AM

DAYS: \_\_\_\_\_ HOURS: \_\_\_\_\_

DAYS: \_\_\_\_\_ HOURS: \_\_\_\_\_

**HOURS OF OPERATION FOR ALCOHOLIC BEVERAGES SERVICE: (If applicable)**

DAYS: Sunday HOURS: Noon - 12AM

DAYS: Monday - Saturday HOURS: 10AM - 12AM

DAYS: \_\_\_\_\_ HOURS: \_\_\_\_\_

**PLEASE NOTE:**

**THE TOWN'S PREPARED FOOD SALES REGULATIONS SET THE PERMISSIBLE HOURS OF FOOD SALES.**

## MENU: (GENERAL TYPE OF FOOD SERVED)

International Variety (e.g. Pastas, Pizzas, Burgers &amp; Sandwiches)

FLOOR SPACE SQ. FT. 2,320

BYOB: Will you permit patrons to bring their own alcoholic beverages onto the premises? No

(If yes, please be aware of applicable Town regulations governing BYOB.)

SEATING CAPACITY: INSIDE: 66 OUTSIDE: 8

Outside seating only applicable for 6 months from April 1<sup>st</sup> – September 30<sup>th</sup>.

(Please attach plan showing location and layout of outdoor seating.)

If outdoor seating is proposed to be located on any portion of the public sidewalk that is Town property, this application must be accompanied by proof that the applicant has secured, and that there is in effect during the period of time for which there will be outdoor seating, a general liability policy naming the Town as an additional insured in a minimum amount of \$250,000.00/\$500,000.00.

By signing this application, the applicant absolves the Town and its officials, officers, employees, agents and representatives from all liability in connection with use by the applicant of the Town's portion of a public sidewalk. By signing this application, the applicant agrees to indemnify the Town for any damage to the Town's sidewalk resulting from the applicant's use of it, and agrees to indemnify the Town for any expenses the Town incurs in restoring the Town's sidewalk to its condition prior to use (in excess of any routine cleaning and maintenance service the Town would ordinarily have performed irrespective of the use).

Applicant agrees to outside seating terms and conditions:

NUMBER OF BATHROOMS: EMPLOYEE: PUBLIC: 2

NUMBER OF PARKING SPACES (IF ANY): None

NUMBER OF EMPLOYEES: 5-12

All Common Victualler Licenses are issued subject to and conditioned on the licensee's compliance with Massachusetts General Laws Chapter 140, Section 2 et seq., Article 8.10 of the Town By-Laws, and the Town's Prepared Food Sales Regulations.

Application Agrees to terms and conditions

APPLICANT SIGNATURE [Signature] TITLE: President PHONE: [Redacted]  
 EMAIL ADDRESS: [Redacted]

## **New Common Victualler / Entertainment**

Applicant: SYS, LLC  
DBA: Dolma Mediterranean Cuisine  
Location: 5 Kendall Street Brookline, MA 02445

### **Application Details:**

Application for a new new Common Victualler for SYS, LLC d/b/a Dolma Mediterranean Cuisine at 5 Kendall Street. Hours of operation will be Monday –Sunday 7:00 am to 12:00 am. Seating will consist of 16 seats.

Application for a new Entertainment for SYS, LLC d/b/a Dolma Mediterranean Cuisine at 5 Kendall Street. Entertainment will consist of radio and recorded music Monday –Sunday 7:00 am to 12:00 am.

This is the former Toichi Ichiban.

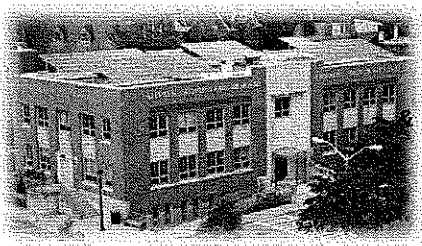
### **Reports (Attached):**

Health Department (Approved)  
Building Department (Approved)  
Police Department (Approved)  
Fire Department (Approved)

## Checklist for Common Victualler w/o Alcohol



- ☒ Common Victualler Application
  - ☒ Description of Operations
  - ☒ Copy of menu
  - ☒ Vote of Corporation
  - ☒ Litter Letter
  - ☒ Renovation Form
  - x3 ☒ License Interview Form
  - ☒ State Tax Verification Form
  - ☒ Three letters of reference
  - ☒ License surrendered letter from previous owner (if applicable)
  - ☒ A set of: a description, illustration, and/or detailed plans
  - ☒ Entertainment Application
  - ☒ Outdoor Seating Application
- 
- ☒ Report from Brookline Police
  - ☒ Report from Building
  - ☒ Report from Fire
  - ☒ Report from Health
  - ☒ DPW (Outside seating only)



**TOWN OF BROOKLINE  
DEPARTMENT OF PUBLIC HEALTH**

**11 Pierce Street, Brookline, Massachusetts, 02445**  
**Telephone: (617) 730-2300 Facsimile: (617) 730-2296**  
**Website: [www.brooklinema.gov](http://www.brooklinema.gov)**

Our vision is an inclusive community that is healthy, safe, connected & equitable for all!

**Dr. Swannie Jett, DrPH, MSc**  
**Director of Public Health**  
**& Human Services**

**BROOKLINE DEPARTMENT OF PUBLIC HEALTH  
M E M O R A N D U M**

To: Melvin Kleckner,  
Town Administrator  
for the Select Board

From: Dr. Swannie Jett, SJ  
Director of Public Health and Human Services

Date: February 10, 2021

Re: Dolma Mediterranean Cuisine  
5 Kendall Street  
SYS, LLC, Applicant

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Please be advised that the Department of Public Health has no objection to the issuance of a Common Victualler/Entertainment recommendation to the above noted establishment.

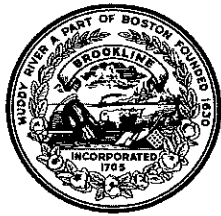
This recommendation is under the following conditions:

- The operator must complete the Department of Public Health Town of Brookline Business Reopening Packet for Restaurants.
- The establishment is renovated to comply with Health Code requirements.
- All required applications and fees are submitted to Department as required.

## 10.A.

- The operator maintains Food Safety and Allergy Awareness Certification.
- An odor control system should be installed and maintained to prevent excessive cooking odors should the Department receive valid nuisance complaints.
- The establishment receives a pre-operational inspection before the license is released.
- The establishment must comply with the Town By-Laws on the use of artificial Trans-Fats, Polystyrene and Offering Public Water.

S:food SelectBoard:CVFoodEnt21



**TOWN OF BROOKLINE**  
*Massachusetts*

**FIRE DEPARTMENT**  
FIRE PREVENTION DIVISION  
PUBLIC SAFETY BUILDING

David Randolph  
Deputy Chief, Fire Prevention

350 Washington Street  
PO Box 470557  
Brookline MA 02447-0557  
Office: 617-730-2270  
Fax: 617-264-6491

February 9, 2021

**Dolma Mediterranean Cuisine – 5 Kendall**

The Fire Department has no issues with the approval of the new Common Victualler license for Dolma Mediterranean Cuisine at 5 Kendall St. Brookline.

Sincerely,

David Randolph  
Deputy Chief  
Fire Prevention Group





**TOWN of BROOKLINE**  
*Massachusetts*

**BUILDING DEPARTMENT**

**Daniel F. Bennett**  
Building Commissioner

**INTEROFFICE MEMORANDUM**

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**Date:** February 5, 2021

**To:** Melvin Kleckner  
Town Administrator

**From:** Daniel Bennett  
Building Commissioner

**Re:** 5 Kendall Street - Application from SYS, LLC, d/b/a Dolma Mediterranean Cuisine, Serkan Otsuz, Manager, for a Common Victualler and Entertainment (radio and taped music) License with hours of operation, Monday-Sunday 7am-12am and seating capacity of 16 (your memo dated January 20, 2021).

The subject premises is located in a L-1.0 Local Business District and the use of the premises as a restaurant of less than 5,000 sf is permitted by right under Section 4.30, Use #30, of the Town of Brookline Zoning By Law.

The premises conforms to the pertinent provisions of the State Building Code for use as a restaurant with a maximum capacity of (16) seats. The applicant is reminded that any change in signage will require review by the Planning Board and a sign permit from this office. It should also be noted that all building, plumbing, gasfitting, wiring and mechanical work requires permits from the Building Department.

Prior to opening to the public, the applicant will be required to submit applications for Certificate of Use and Certificate of Inspection and request an inspection from the Building Department.

If an odor problem occurs as a result of this use, an odor/exhaust control system designed and stamped by a registered professional engineer must be installed with a maintenance and cleaning schedule submitted to the Building Department.

The Building Department has no objection with the application from SYS, LLC, d/b/a Dolma Mediterranean Cuisine, Serkan Otsuz, Manager, for a Common Victualler and Entertainment (radio and taped music) License with hours of operation, Monday-Sunday 7am-12am and seating capacity of 16.



SUPT. MARK P. MORGAN  
ACTING CHIEF OF POLICE

## BROOKLINE POLICE DEPARTMENT

*Brookline, Massachusetts*

**Sergeant David Hill**

*Patrol Supervisor*

*Brookline Police Dept.*

*617-730-2654*

*dhill@brooklinema.gov*

January 22, 2021

TO: Superintendent Morgan

RE: Common Victualler License – Dolma Mediterranean Cuisine

Sir,

I received a memorandum from Town Hall regarding a request by Selim Gurel on behalf of SYS LLC. for a new Common Victualler License at 5 Kendall Street. This location was previously occupied by the Toichi Ichiban Japanese restaurant. The new location will be a Mediterranean restaurant doing business as *Dolma Mediterranean Cuisine*. Business hours will be 7:00AM to 12:00AM seven days a week. At this time there do not appear to be renovations planned, and the existing space appears sufficient for the requested indoor seating capacity of 16. There is no request for outdoor seating, and there will not be alcohol on the premises.

Mr. Gurel appears to have experience in the food industry and has previously held Common Victualler licenses in Brookline previously owning and operating the Angora Café on Commonwealth Ave. for many years. Mr. Gurel's application includes references from individuals that know him both personally and professionally. This department has assisted Mr. Gurel in the past when his previous business was burglarized. I find no public safety reasons to deny this license.

Included in this application is a request for an entertainment license for the use of a radio and taped music during hours of operation. This is consistent with the licenses of similar common victuallers, and I have no objections to this request.

Respectfully submitted,

Sgt. David Hill S-14



Public Safety Building, 350 Washington Street, Brookline, Massachusetts 02445  
Telephone (617) 730-2249 ♦ Facsimile (617) 730-8454

21 JUN 20 11:10



OFFICE OF SELECT BOARD  
333 WASHINGTON STREET  
BROOKLINE, MA 02445  
(617) 730-2200

**APPLICATION FOR  
COMMON VICTUALLER LICENSE**

DATE: 01/20/2021

LOCATION: 5 Kendall Street, Brookline, MA 02445

APPLICANT: SYS LLC.

INDIVIDUAL/PARTNERSHIP/CORPORATION

D/B/A: Dolma Mediterranean Cuisine

BUSINESS OWNERSHIP- INDIVIDUAL/PARTNERS/CORPORATE OFFICERS:

NAME	TITLE	EMAIL ADDRESS
Selim Gurel	Manager	selimgurel@comcast.net

TELEPHONE #	ADDRESS
<div style="background-color: black; height: 20px; width: 100%;"></div>	

NAME	TITLE	EMAIL ADDRESS
Yesim Otsuz	Manager	yesimotsuz@gmail.com

TELEPHONE #

ADDRESS

\_\_\_\_\_

NAME

TITLE

EMAIL ADDRESS

Serkan Otsuz

Manager

sotsuz@gmail.com

TELEPHONE #

ADDRESS

\_\_\_\_\_

HAVE YOU PREVIOUSLY HELD A COMMON VICTUALLER LICENSE IN BROOKLINE/ELSEWHERE? Yes

IF YES, LOCATION: AND DATES: 1020 Commonwealth Avenue, Angora Coffee Shop 1990-2000

1024-A Commonwealth Avenue, Angora Cafe 2001-2017

IF NOT, DO YOU HAVE PRIOR EXPERIENCE IN THE FOOD SERVICE BUSINESS: \_\_\_\_\_

IF YES, LOCATION: AND DATES \_\_\_\_\_

\_\_\_\_\_

**HOURS OF OPERATION FOR FOOD SERVICE:**

DAYS: Monday-Sunday

HOURS: 7 AM - 12 AM

DAYS: \_\_\_\_\_

HOURS: \_\_\_\_\_

DAYS: \_\_\_\_\_

HOURS: \_\_\_\_\_

**HOURS OF OPERATION FOR ALCOHOLIC BEVERAGES SERVICE: (If applicable)**

DAYS: \_\_\_\_\_

HOURS: \_\_\_\_\_

DAYS: \_\_\_\_\_

HOURS: \_\_\_\_\_

DAYS: \_\_\_\_\_

HOURS: \_\_\_\_\_

**PLEASE NOTE:**

**THE TOWN'S PREPARED FOOD SALES REGULATIONS SET THE PERMISSIBLE HOURS OF FOOD SALES.**

MENU: (GENERAL TYPE OF FOOD SERVED)

Meze (appetizers), Roll-up sandwiches, Salad bowls, desserts and drinksFLOOR SPACE SQ. FT. 1,100

BYOB: Will you permit patrons to bring their own alcoholic beverages onto the premises? \_\_\_\_\_

(If yes, please be aware of applicable Town regulations governing BYOB.)

SEATING CAPACITY: \_\_\_\_\_ INSIDE: 16 OUTSIDE: n/aOutside seating only applicable for 6 months from April 15<sup>th</sup> – October 15<sup>th</sup>.

(Please attach plan showing location and layout of outdoor seating.)

If outdoor seating is proposed to be located on any portion of the public sidewalk that is Town property, this application must be accompanied by proof that the applicant has secured, and that there is in effect during the period of time for which there will be outdoor seating, a general liability policy naming the Town as an additional insured in a minimum amount of \$250,000.00/\$500,000.00.

By signing this application, the applicant absolves the Town and its officials, officers, employees, agents and representatives from all liability in connection with use by the applicant of the Town's portion of a public sidewalk. By signing this application, the applicant agrees to indemnify the Town for any damage to the Town's sidewalk resulting from the applicant's use of it, and agrees to indemnify the Town for any expenses the Town incurs in restoring the Town's sidewalk to its condition prior to use (in excess of any routine cleaning and maintenance service the Town would ordinarily have performed irrespective of the use).

Applicant agrees to outside seating terms and conditions: yesNUMBER OF BATHROOMS: \_\_\_\_\_ EMPLOYEE: 1 PUBLIC: 1NUMBER OF PARKING SPACES (IF ANY): N/ANUMBER OF EMPLOYEES: 3

All Common Victualler Licenses are issued subject to and conditioned on the licensee's compliance with Massachusetts General Laws Chapter 140, Section 2 et seq., Article 8.10 of the Town By-Laws, and the Town's Prepared Food Sales Regulations.

Application Agrees to terms and conditions Yes, Selim Gurel

APPLICANT SIGNATURE  TITLE: Manager PHONE#   
 EMAIL ADDRESS selim.gurel@comcast.net

VOTE OF CORPORATIONDATE: 01/20/2021AT A MEETING OF THE BOARD OF DIRECTORS OF SYS LLC.HELD AT: 5 Kendall Street, Brookline MA 02445ON: 01/20/2021

IT WAS DULY VOTED THAT THE CORPORATION APPLY TO THE LICENSING BOARD FOR THE TOWN OF BROOKLINE FOR A

Common victualler license

(TYPE OF LICENSE)

FOR THE YEAR 2021 TO BE EXERCISED ON THE PREMISES LOCATED ATVOTED: TO AUTHORIZE Selim Gurel TO SIGNTHE APPLICATION FOR THE LICENSES IN THE NAME OF SYS LLC. dba Dolma

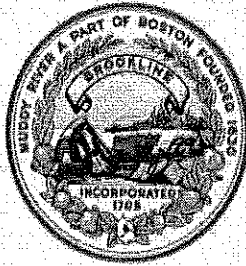
AND TO EXECUTE ON ITS BEHALF ANY NECESSARY PAPERS, AND TO DO ALL THINGS REQUIRED RELATIVE TO THE GRANTING OF THE LICENSE.

THIS CORPORATION HAS not BEEN RESOLVED.

A TRUE COPY

ATTEST:

CLERK



**RENOVATION FORM**

IF RENOVATIONS ARE BEING MADE TO LOCATION: PLEASE DESCRIBE IN DETAIL WHAT RENOVATIONS WILL BE MADE, DATE AND SIGN BELOW.

(1) No major renovations planned. ( see plan) Painting and cleaning mostly

\_\_\_\_\_

(2) \_\_\_\_\_

\_\_\_\_\_

(3) \_\_\_\_\_

\_\_\_\_\_

(4) \_\_\_\_\_

\_\_\_\_\_

(5) \_\_\_\_\_

\_\_\_\_\_

(6) \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

DATE: 01/20/2021 SIGNATURE OF APPLICANT: 

**(PLEASE SUBMIT THREE SETS OF PLANS )**



LICENSE INTERVIEW FORM

TYPE OF LICENSE APPLYING FOR: Common Victualler

NAME: Selim Gurel

ADDRESS: [REDACTED]

EMAIL ADDRESS: selimgurel@comcast.net

PHONE #: [REDACTED]

PLACE OF BIRTH: Istanbul Turkey

FATHER'S NAME: Gokalp Gurel MOTHER'S MAIDEN NAME: Tokgoz

ARE YOU A CITIZEN? YES ☒ NO ☐ ALIEN CARD # \_\_\_\_\_

ARE YOU A VETERAN: YES ☐ NO ☒

**RESIDENCES FOR LAST FIVE YEARS**

DATE: 2017-2021 LOCATION: [REDACTED] Boston MA 02130

DATE: 1997-2016 LOCATION: [REDACTED] Boston MA 02130

DATE: \_\_\_\_\_ LOCATION: \_\_\_\_\_

DATE: \_\_\_\_\_ LOCATION: \_\_\_\_\_

DATE: \_\_\_\_\_ LOCATION: \_\_\_\_\_

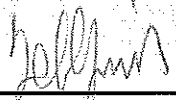


**EDUCATION**

<b>DATE:</b> 1995	<b>LOCATION:</b> BHCC Charlestown, MA
<b>DATE:</b> 1985	<b>LOCATION:</b> Istanbul University, Istanbul Turkey
<b>DATE:</b> 1980	<b>LOCATION:</b> Yesilkoy Lisesi, Istanbul Turkey
<b>DATE:</b> 1977	<b>LOCATION:</b> Yesilkoy Ortaokulu, Istanbul Turkey

**EMPLOYMENT HISTORY**

<b>DATE:</b> 2017-2021	<b>LOCATION:</b> Boston, MA	<b>POSITION:</b> Self
<b>DATE:</b> 1990-2017	<b>LOCATION:</b> Brookline, MA	<b>POSITION:</b> Self
<b>DATE:</b>	<b>LOCATION:</b>	<b>POSITION:</b>
<b>DATE:</b>	<b>LOCATION:</b>	<b>POSITION:</b>
<b>DATE:</b>	<b>LOCATION:</b>	<b>POSITION:</b>

**SIGNATURE:**  **DATE:** 01/20/2021

**(PLEASE SUBMIT THREE CHARACTER REFERENCES WITH APPLICATION)**



## Faneuil Hall Dental Associates

177 B State Street  
McKinley Building  
Boston, MA 02109  
617 523-4444

January 14, 2021

To whom it may concern:

I have known Selim Gurel for over 20 years. He has been involved in the food and hospitality industries, therefore acquiring extensive knowledge about trends regarding Boston residents' desires.

His hands on approach has helped him with his previous businesses. He is very talented with hiring employees possessing necessary skills or training them so they become proficient in what they do. I have no doubt even in these trying times he will do all he can to create an establishment we will all enjoy visiting.

Please let me know if you have any further questions about Selim's qualifications as I would be glad to provide more insight. I can be reached by phone at 617-523-4444; [smile@fh dental.com](mailto:smile@fh dental.com).

Best regards,  
Dr. Mehmet Kahveci

01/12/2021

To whom it may concern,

I have known Selim Gurel in a variety of capacities for many years. He has been my employer to start with. We become close friends / almost family members. We have been in touch while we are establishing our own families in the US.

He became one of my favorite person as time goes by. His dedication and willingness to work long hours to get the job done have made his businesses very successful for a long time. I have always admired his work ethic.

I know Selim to be dependable, responsible, honest and courteous and he will be an asset in the Town of Brookline as he had been for many years before.

Please don't hesitate to contact me if you would like to discuss this recommendation further.

Sincerely,

Ahmet Ucar

A handwritten signature in cursive script that reads "A Ucar".

Troy Global LLC  
278 Charles Street  
Malden, MA 02148  
(617) 987-7039

January 14, 2021

Re: Selim Gurel

To Whom It May Concern:

I have known Selim for approximately 6 years.

Selim has been a past commercial client of mine and a residential tenant for almost 5 years.

He is professional, reliable and plans to remain renting at his current residence located at  
21 Sunnyside Street in Jamaica Plain (Boston).

Feel free to contact me should you have any questions.

Sincerely,



Arman Chitchian  
Realtor®, ABR, CRS

Jack Conway & Company  
O: 617-964-0434 | C: 617-513-6704  
E-Fax: 617-777-1269  
317 Washington Street - Brighton, MA 02135

[www.jackconway.com](http://www.jackconway.com)  
Leading You Home

# Selim Gürel



## EXPERIENCE

### **Dolma, Boston — Founder**

November, 2019 - PRESENT

### **Soba LLC, Boston — Owner, Operator**

June, 2017 - PRESENT

Lodging, Hosting

### **Angora Cafe, Brookline, MA — Owner, Operator**

September, 2001 - May, 2017

Ethnic, Casual Restaurant

### **Metropolitan Desserts, Brookline, MA — Owner, Operator**

May, 2012 - May, 2017

High End Dessert Delivery

### **Angora Ice, Chestnut Hill, MA — Founder**

May, 2008 - October, 2011

Ice Cream Store

### **Turquoise Cafe, Brighton, MA — Co-Founder**

September, 2004 - November, 2009

Cafe & Grocery Store

### **Angora Coffee Shop, Brookline, MA — Founder**

September, 2001 - May, 2017

Coffee shop.

## SKILLS

Operation Manager

Project Manager

Multi Location Operator

Concept Creator

## LANGUAGES

English, Turkish

## EDUCATION

**BHCC,**

**Charlestown, US**

***Hospitality Management***

SEPTEMBER, 1988 - May 1990

**Istanbul University,**

**Istanbul, Turkey**

***Business Management***

September 1981 - May 1986



**LICENSE INTERVIEW FORM**

**TYPE OF LICENSE APPLYING FOR:** CV LICENSE

**NAME:** SERKAN OTSUZ

**ADDRESS:** [REDACTED]

**EMAIL ADDRESS:** sotsuz@gmail.com

**PHONE #:** [REDACTED]

**PLACE OF BIRTH:** ISTANBUL

**FATHER'S NAME:** SERTAC **MOTHER'S MAIDEN NAME:** KUCUK

**ARE YOU A CITIZEN?** YES NO ☒ **ALIEN CARD #** [REDACTED]

**ARE YOU A VETERAN:** YES NO ☒

**RESIDENCES FOR LAST FIVE YEARS**

**DATE:** 2018 **LOCATION:** WALTHAM / MA

**DATE:** 2006/2018 **LOCATION:** ANTALYA / TURKEY

**DATE:** \_\_\_\_\_ **LOCATION:** \_\_\_\_\_

**DATE:** \_\_\_\_\_ **LOCATION:** \_\_\_\_\_

**DATE:** \_\_\_\_\_ **LOCATION:** \_\_\_\_\_

**EDUCATION**

**DATE:** 1993/1996 **LOCATION:** TURKEY / HIGH SCHOOL

**DATE:** 1990/1993 **LOCATION:** TURKEY / MIDDLE SCHOOL

**DATE:** 1985/1990 **LOCATION:** : TURKEY / ELEMENTERY SCHOOL

**DATE:** **LOCATION:**

**EMPLOYMENT HISTORY**

**DATE:** 2019/ **LOCATION:** WALTHAM / MA **POSITION** OWNER

**DATE:** 2016/2017 **LOCATION:** TURKEY **POSITION** OWNER

**DATE:** 2013/2015 **LOCATION:** MAXXROYAL **POSITION** BAR MANAGER

**DATE** 2005/2013 **LOCATION:** GLORIA GOLF **POSITION** BARTENDER

**DATE:** **LOCATION:** **POSITION**

**SIGNATURE:** *SOTSUZ* **DATE:** 01/19/2021

**(PLEASE SUBMIT THREE CHARACTER REFERENCES WITH APPLICATION)**



**LICENSE INTERVIEW FORM**

TYPE OF LICENSE APPLYING FOR: CV LICENSE

NAME: YESIM OTSUZ

ADDRESS: [REDACTED]

EMAIL ADDRESS: yesimotsuz@gmail.com

PHONE #: [REDACTED]

PLACE OF BIRTH: ESKISEHIR

FATHER'S NAME: GUNDUZ MOTHER'S MAIDEN NAME: PERKEL

ARE YOU A CITIZEN? YES NO ☒ ALIEN CARD # [REDACTED]

ARE YOU A VETERAN: YES NO ☒

**RESIDENCES FOR LAST FIVE YEARS**

DATE: 01/2018 LOCATION: WALTHAM

DATE: \_\_\_\_\_ LOCATION: \_\_\_\_\_

DATE: \_\_\_\_\_ LOCATION: \_\_\_\_\_

DATE: \_\_\_\_\_ LOCATION: \_\_\_\_\_

DATE: \_\_\_\_\_ LOCATION: \_\_\_\_\_



**EDUCATION****DATE:** 2007/ 2011 **LOCATION:** UNIVERSTY / TURKEY**DATE:** 1998/2002 **LOCATION:** HIGH SCHOOL**DATE:** 1995/1998 **LOCATION:** MIDDLE SCHOOL**DATE:** 1990/1995 **LOCATION:** ELEMENTRY SCHOOL**EMPLOYMENT HISTORY****DATE:** 2019 **LOCATION:** WALTHAM **POSITION** OWNER**DATE:** 2016/2017 **LOCATION:** TURKEY **POSITION** OWNER**DATE:** 2010/2016 **LOCATION:** TURKEY **POSITION** CHEF DE CUISINE**DATE:** 20025/2009 **LOCATION:** TURKEY **POSITION** WAITRESS**DATE:** **LOCATION:** **POSITION****SIGNATURE:** *YOTSUZ* **DATE:** 01/19/2021**(PLEASE SUBMIT THREE CHARACTER REFERENCES WITH APPLICATION)**

February 11th, 2020

To whom it may concern,

This letter gives me a great pleasure to support Yesim Otsuz. Yesim has been running a successful online food service "Yesim's Kitchen" in New England area since March 2019. I have known Yesim for almost nine months. I first met her when she catered for one of the community meet ups. Not only her food was delicious, just like my mother's, but also her energy, enthusiasm and her willingness to serve to people was exceptional. She has been successfully catering to the events, parties, business meet ups. In addition, she has been delivering healthy home-cooked meals to support working families who are struggling with time to cook and giving them time to relax. Her delicious food is an authentic Turkish and Mediterranean cuisine. Since she started her business, I have seen her being one of the best ambassadors of Turkish cuisine in New England area. I am truly confident that her entrepreneur mindset, warm, engaged and energetic personality to serve people will carry her to many successful accomplishments in her career.

Should you have any questions, please do not hesitate to contact with me.

Best regards,

Deniz B Temel, Ph.D.

Analytical CMC Manager

Bristol-Myers Squibb Inc.

Email: dbtemel@gmail.com

Phone: 1-646-9388655

*Serap Kantarci, LMHC  
17 Steps Counseling Inc.  
129 Mount Auburn Street  
Cambridge, MA 02138*

To Whom it May Concern,

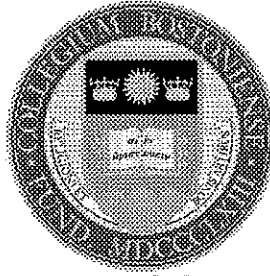
2/2/2020

I would like to take this opportunity to recommend Yesim Otsuz and Serkan Otsuz to you, whom I have known for the last two years. Yesim and her husband, Serkan have been helping my consulting company, 17 Steps Counseling, and the non-profit organization, DUNYA, which I am the co-founder of with providing delicious Mediterranean food for lunch and catering for the business and social events. Both Yesim and Serkan have done an amazing job while taking huge responsibilities and making commitments through event planning and catering. I am confident that Yesim and Serkan will run their own café/restaurant exceptionally well with their authentic style and great professionalism with no problems whatsoever.

Immediately after I hired Yesim and Serkan for event planning and catering job, it became evident to me that they were very talented and capable of accomplishing a great deal more than the typical responsibilities of chefs and caterers. They have been always reliable, responsible and respectful while doing business with my company, 17 Steps Counseling, my non-profit organization, DUNYA and all other companies that they have worked with. I know that this power couple can work exceptionally well under pressure and their project management, leadership and organizational skills will bring tremendous success to their business.

If you have any questions or would like to discuss anything further, please call me at: 781-354-2102 or email me at: [17stepscounseling@gmail.com](mailto:17stepscounseling@gmail.com)

Regards,  
Serap Kantarci

**BOSTON COLLEGE**

CHESTNUT HILL, MASSACHUSETTS 02467-3806

Can Erbil, Professor of Practice  
Department of Economics  
Chestnut Hill, MA 02467

Phone: (617) 552-3670  
E-mail: can.erbil@bc.edu  
Fax: (617) 552-2308

02/11/2020

Dear Madam/Sir,

I am writing this letter to support Mrs. Yesim Otsuz and Mr. Serkan Otsuz in their search for a commercial property for their new venue.

I have known the Otsuz family for several months and have interacted with them as one of their customers in four different occasions. I have also been part of several other social gatherings where Yesim's Kitchen was the caterer. In all of my own personal exchanges, the Otsuz were always very professional, respectful, dependable and pleasant. I have heard similar positive feedback from many friends and acquaintances.

Currently, their catering business is one of the most highly demanded services in the greater Boston area amongst my social circles. As an Economics Professor at Boston College, as well as a former Business School Professor at Brandeis University, I am also very impressed with the entrepreneurial skills and potential of the Otsuz couple. I predict their new venue will be also vastly successful. I am expecting them to be a long-term establishment in Boston's culinary canvas.

I know the Otsuz family as an enthusiastic young couple with impeccable character, and a with a track record of accomplishment. As a property owner, I also recently went through the process of choosing potential renters, and know the importance of due diligence and finding the right tenants. I am convinced that the Otsuz couple will be responsible and reliable leaseholders. I recommend them without hesitation. Feel free to contact me if you have further questions.

Sincerely,

A handwritten signature in black ink, appearing to read "Can Erbil".

Can Erbil  
Professor of Practice of Economics  
Department of Economics  
Boston College  
Chestnut Hill, MA 02467

February 11, 2020, Boston

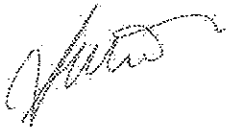
Reference: Ms. Yesim Otsuz and Yesim's Kitchen

To Whom It May Concern:

I am writing this letter as a strong support and testimony that Ms. Yesim Otsuz and her business enterprise-“Yesim's Kitchen” are in good-standing and valuable members of our community. I know Yesim and her husband for more than a year. They are both extremely hard workers and have built a very strong network of community and business relations in a very short time. Yesim's Kitchen is growing fast and is already making a strong impact and impression on the ethnic food community scene in our diverse Boston-Cambridge area. The consistency and quality of their produce are stellar. Most importantly, they always serve with the biggest smile and excellent customer experience, which are critical for the service sector. I have no doubt that Yesim's Kitchen and Ms. Yesim Otsuz will be a long-term member of Boston-Cambridge community and our food experience.

I will be more than happy to provide further support if needed.

Sincerely,



Alpdogan Kantarci, DDS, PhD.

Diplomate, American Board of Periodontology

Director of Clinical Operations, Forsyth Faculty Associates (FFA) Dental Clinic

Adjunct Associate Professor, Boston University, Henry M. Goldman School of Dental Medicine

Lecturer, Harvard University School of Dental Medicine

Forsyth Institute

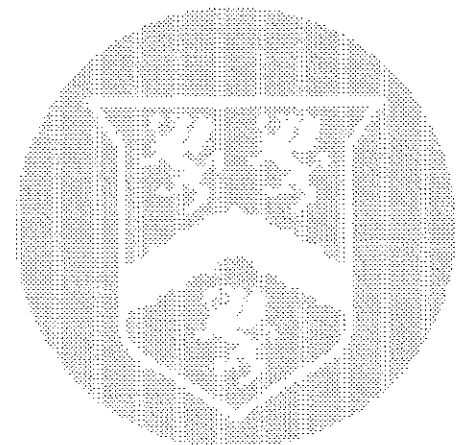
245 First Street #6103

Cambridge, MA 02142

USA

Phone: +1 617 892 8530

Email: [akantarci@forsyth.org](mailto:akantarci@forsyth.org)



# YESIM OTSUZ

## Summary

Focused Business Owner with knowledge of customer service, time management and effective planning. Skilled at handling phone duties and reservations. Experienced in coordinating large-scale events and intimate dining. Proactive and friendly with over 10 years of experience in Food industry.

## Skills

- Menu memorization
- High-volume dining
- Effective sales techniques
- Point of Sale (POS) system operations
- Check payment processing
- Liquor, wine and food service
- Table setting arrangements
- Menu knowledge

## Experience

**BUSINESS OWNER** | 02/2019 to Current

**Yesim's Kitchen - Waltham, MA**

- Leveraged social media, including Yesim's Kitchen to expand market reach and facilitate sales agent recruitment.
- Promoted business on social media platforms to maximize brand identity and generate revenue.
- Managed food preparation, guest interaction, quality control, and customer relations.
- Set and administered annual operating budget, consistently maintaining controls and preventing overages.
- Managed over 1000 customer inquiries per day by answering questions on available stock and product performance.
- Photographed products for sale and posted pictures online to increase visibility and showcase current product availability.

**BUSINESS OWNER** | 01/2016 to 12/2017

**Evdeki Lezzetler Restaurant - Antalya, TURKEY**

- Devised and implemented standard operating procedures, training program, and office management systems, including inventory management, financial management, and human resource management; actualized processes to successfully fulfill sales via phone, in store, and consignment.
- Actively promoted store offerings through newspaper advertisements, catalogs, and brochures to attract new customers.
- Launched successful startup offering lively, social setting for customers to learn step-by-step painting skills.
- Managed financial functions such as operations budgeting, accounts payable and accounts receivable, and payroll.

**CHEF DE CUISINE** | 01/2010 to 12/2016

**Amara Club Marine - Antalya, TURKEY**

- Communicated effectively with wait staff regarding patron food allergies and dietary restrictions.
- Monitored quality, presentation and quantities of plated food across line.
- Planned and prepared food products orders to maintain appropriate stock levels.
- Tracked kitchen's inventory and ordered new food and supplies when needed.

**WAITRESS** | 02/2005 to 11/2009

**Miracle Resort Hotel - Antalya, TURKEY**

- Stocked server areas with supplies before, during and after shifts to boost performance of serving staff.
- Frequently communicated with kitchen staff to stay up to date on supply availability and potential customer wait times.
- Updated repeat customers on menu changes and updates to maintain quality service relationships.
- Cleaned, sanitized and organized food speed racks, bins and dry storage racks to keep food storage areas neat and prevent food-borne illness.

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## Education and Training

**ANATOLIA UNIVERSITY - ESKISEHIR / TURKEY | BBA**

Business Administration And Management, 06/2006

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## Websites, Portfolios, Profiles

- [www.yesimskitchen.com](http://www.yesimskitchen.com)
- Yesim's Kitchen MA - Facebook Page
- Delicious\_athome - Instagram

# SERKAN OTSUZ

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## Summary

Customer-oriented restaurant professional well-versed in liquor, beer, specialty drinks and Foods. Diligent about restocking supplies and keeping customer areas clean. Ready to take on new professional challenge and learn new skills at Maxx Royal Hotel.

Results-oriented, strategic sales professional with 15 years in the Food&Beverage industry.

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## Skills

- Safe serving knowledge
- Maintaining glassware stock
- Beer, wine and soju cocktails
- Health codes compliance
- Food service

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## Experience

**Business Owner** | Yesim's Kitchen - Waltham, ME | 02/2019 - Current

- Maintained functional and neat building areas to meet all business needs and deliver professional appeal to customers.
- Managed financial functions such as operations budgeting, accounts payable and accounts receivable, and payroll.
- Calculated credit amounts and commission payouts, priced merchandise, and generated credit memos for returned merchandise.

**Business Owner** | Evdeki Lezzetler Restaurant - Antalya, Türkiye | 01/2016 - 12/2017

- Participated in labor contract negotiations with union to successfully achieve new agreement representing mutually agreed elements.
- Managed food preparation, guest interaction, quality control, and customer relations.
- Leveraged social media, including Facebook, to expand market reach and facilitate sales agent recruitment.
- Maintained up-to-date knowledge of all statutory requirements and regulations.
- Monitored market conditions to set accurate pricing structures and take advantage of emerging trends.

**Bar Manager** | Maxx Royal Hotel - Antalya, Turkey | 01/2013 - 12/2015

- Reorganized bar stations to streamline overall efficiency and service flow.
- Set effective employee schedules, maintaining coverage at peak times and minimizing labor costs.

**Bar/ender Shift Manager** | Gloria Golf Resort Hotel - Antalya, TURKEY | 02/2005 - 01/2013

- Neatly sliced and pitted fruit or garnishing drinks.
- Planned and updated menus to capitalize on changing trends in customer preferences.
- Checked identification of customers to verify age requirements needed for purchase of alcohol.

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## Education and Training

Bahcelievler High School | Istanbul | 06/1996



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### Websites, Portfolios, Profiles

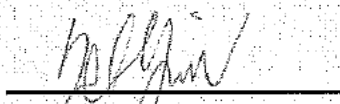
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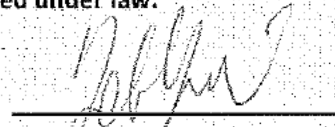
- [www.yesimskitchen.com](http://www.yesimskitchen.com)



**STATE TAX VERIFICATION FORM**

**I certify under the penalties of perjury that I, to my best knowledge and belief, have filed all state tax returns and paid all state taxes as required under law.**

  
 \_\_\_\_\_  
**\*Signature of Individual**

  
 \_\_\_\_\_  
**By: Corporate Officer**

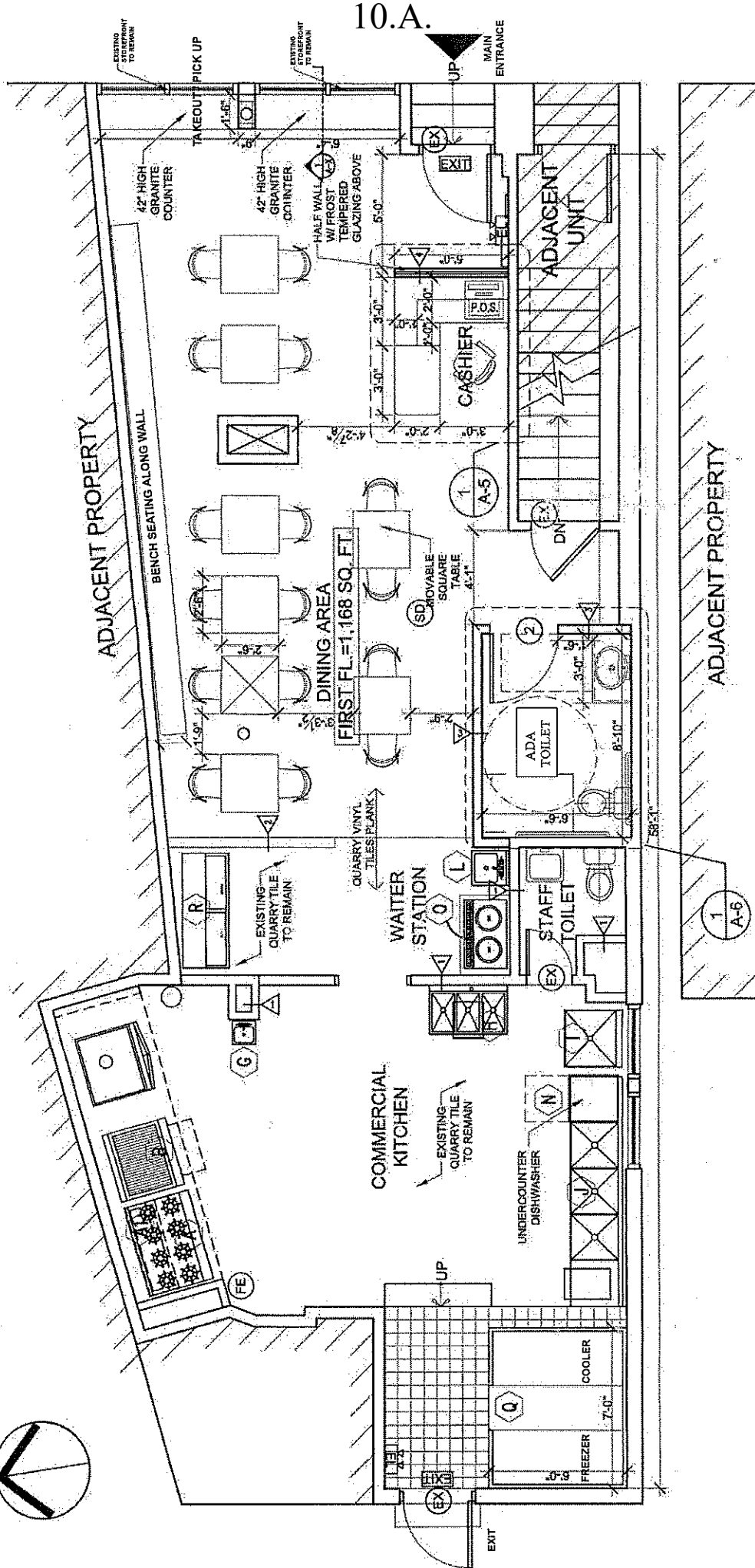
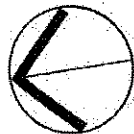


**\*\* Social Security #**

**Voluntary or Federal ID #**

**\*This license will not be issued unless this certification clause is signed by the applicant.**

**\*\*Your social security number will be furnished to the Massachusetts Department of Revenue to determine whether you have met tax filing or tax payment obligations. Licensees who fail to correct their non-filing or delinquency will be subject to license suspension or revocation. This request is made under the authority of Massachusetts General Law Chapter 62C, Section 49A.**



10.A.

**1** EXISTING FIRST FLOOR PLAN

**DOLMA MEDITERRANEAN CUISINE**

1/4" = 1'-0"  
17 JANUARY 2021  
AS BUILT DRAWING OF EXISTING CONDITIONS  
DRAWING BY: JOHN K. YOO-TABERNER  
CHECKED BY: IAN F. TABERNER, AIA

5 KENDALL STREET  
BROOKLINE, MASSACHUSETTS  
02445

- (A) 8 burner range (B) grill (C) convection oven (G-L) Hand sink
- (H) Vegetable Sink (I) Utility Sink (J) 3 bay sink (N) Dishwasher
- (Q) Cooler, freezer (O) Tea station (R) i/c cooler

SYS LLC dba Dolma

GENERAL DESCRIPTION OF THE OPERATIONS;

16 seats inside( 4 during the COVID ), take-out food, delivery with delivery companies ( Ubereats, Doordash, Grubhub, etc) Operation Hours 9AM-10PM, take-out and delivery available during the operation hours. Parking spots available in the neighborhood for short stops for pick-up food.

LITTER

We signed a contract with Republic Services Waste and Recycling. 2-96 Gallon containers for solid waste, 1-96 Gallon Container will be picked twice a week ( Tuesday, Friday) starting 01/22/2021. Containers will be kept in the backyard, covered.

PEST CONTROL

Waltham Pest Control will monitor the activity once a week.(or more if necessary)



## **Lunch & Dinner Menu**

### **Soups of the day**

(samples)

Lemon Chicken Rice, Red Lentil, Roasted Carrot & Apple Soup, Matzo Ball Soup, Chicken Curry Soup, and others

### **Entrees and Mezes**

(we will pick 4-6 every day from our wide variety of catering menu options)

Stuffed Eggplant ( ground beef)

Baba Ganoush

Tabouli

Hummus of the day

Stuffed Cabbage

Dolma (stuffed Peppers)

Red Lentil Patties

Borek of the day (Spinach Feta Pie)

Mousaka

Grape Leaves

### **Create your own Bowls and wraps**

(Customer pick several items from display we serve them either in the bowl or in the freshly made lavash bread)

Sauteed chicken, beef or vegetables

With pilafs, pasta or greens,

Several our own sauces

### **Pizza Menu ( being worked on )**

### **Dessert**

Baklava, Rice Pudding, Cheese Cake, Rugelach

Catering menu [www.yesimskitchen.com](http://www.yesimskitchen.com)



OFFICE OF SELECT BOARD  
333 WASHINGTON STREET  
BROOKLINE, MA 02445  
(617) 730-2200

ENTERTAINMENT APPLICATION

IN ACCORDANCE WITH THE PROVISIONS OF CHAPTER 140, SECTION 181 (\*183A) OF THE MASSACHUSETTS GENERAL LAWS, THE UNDERSIGNED HEREBY APPLIES FOR A LICENSE FOR THE FOLLOWING FORMS OF ENTERTAINMENT:

APPLICANT: SYS LLC.

D/B/A Dolma

LOCATION: 5 Kendall Street, Brookline, MA 02445

TELEPHONE # 617-699-5535 EMAIL ADDRESS: selimgurel@comcast.net

TYPE OF ENTERTAINMENT:

(1) RADIO ☒ TAPED MUSIC ☒ JUKE BOX \_\_\_\_\_ TELEVISION \_\_\_\_\_  
DAYS: Monday - Sunday HOURS: FROM: 7 AM TO: 12 AM

(2) MOVIES \_\_\_\_\_  
DAYS: \_\_\_\_\_ HOURS: FROM: \_\_\_\_\_ TO: \_\_\_\_\_

(3) DANCING \_\_\_\_\_ PRIVATE \_\_\_\_\_ PUBLIC \_\_\_\_\_  
DAYS: \_\_\_\_\_ HOURS: FROM: \_\_\_\_\_ TO: \_\_\_\_\_

(4) INSTRUMENTAL MUSIC \_\_\_\_\_ TYPE OF INSTRUMENTS: \_\_\_\_\_  
 #OF INSTRUMENTS \_\_\_\_\_

DAYS: \_\_\_\_\_ HOURS: FROM: \_\_\_\_\_ TO: \_\_\_\_\_

(5) VOCAL MUSIC : \_\_\_\_\_ #OF VOCALIST: \_\_\_\_\_

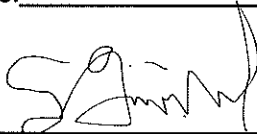
DAYS: \_\_\_\_\_ HOURS: FROM: \_\_\_\_\_ TO: \_\_\_\_\_

(6) EXHIBITION (DESCRIBE): \_\_\_\_\_

DAYS: \_\_\_\_\_ HOURS: FROM: \_\_\_\_\_ TO: \_\_\_\_\_

(7) FLOOR SHOW (DESCRIBE): \_\_\_\_\_

DAYS: \_\_\_\_\_ HOURS: FROM: \_\_\_\_\_ TO: \_\_\_\_\_



01/20/2021

SIGNATURE OF APPLICANT

DATE

(\*SECTION 183A APPLIES ONLY TO COMMON VICTUALLERS, FOOD VENDORS AND INNHOLDERS)

THE FOLLOWING FORMS OF ENTERTAINMENT IF BEING CONDUCTED ON SUNDAYS REQUIRES A SEPARATE SUNDAY ENTERTAINMENT LICENSE FROM THE COMMONWEALTH OF MASSACHUSETTS AND REQUIRES A SEPARATE FEE OF \$100:

DANCING  
 JUKE BOX  
 LIVE ENTERTAINMENT



# *Town of Brookline*

## *Massachusetts*

**Department of Planning and  
Community Development**

Town Hall, 3<sup>rd</sup> Floor  
333 Washington Street  
Brookline, MA 02445-6899  
(617) 730-2130 Fax (617) 730-2442  
ASteinfeld@brooklinema.gov

**Alison C. Steinfeld**  
**Director**

TO: Select Board  
CC: Roger Blood, Chair of the Housing Advisory Board  
FROM: Alison C. Steinfeld, Planning Director  
SUBJ: Housing Production Plan—Request for Proposals  
DATE: February 12, 2021

As you recall, the Planning Department and Chair of the Housing Advisory Board were before you on January 26<sup>th</sup> to present a draft Request for Proposals (RFP) to engage a consultant to develop a Housing Production Plan (HPP), the purpose of which is two-fold: 1.) meet the requirements of the Department of Housing and Community Development in order to secure certification of the plan if and when the Town is eligible for a temporary safe harbor from c. 40B and 2.) provide a strategic five-year plan to produce market and affordable housing. Broad public participation is integral to the plan preparation.

The Select Board was generally supportive of the draft, but two members requested some modifications relative to impact analysis and disadvantaged businesses. The Planning Department, with input from Town Counsel's Office, has attempted to respond to the request for modifications, and have proposed changes, identified with "track changes" in the attachment labeled "Draft A." Similarly, Select Board Member Heller has submitted changes relative to impact analysis, as requested by the Chair; her proposed changes are set forth in "track changes" in the attached version, labeled "Draft B."

We are providing the two drafts in order to frame the Board's discussion. The Planning Department is respectfully requesting direction from the Board so that we may insure that the final RFP reflects the Select Board's position on the Scope of Work.

Planning Department staff and the Chair of the Housing Advisory Board will be available to respond to your questions and to receive the Board's direction.



**DRAFT A**~~42-28114-2021~~2.22.2020

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**TOWN OF BROOKLINE - PURCHASING DIVISION**  
**333 Washington Street Brookline, Massachusetts 02445**

**REQUEST FOR PROPOSALS**  
**HOUSING PRODUCTION PLAN CONSULTANT**

**GENERAL**

Competitive sealed proposals are invited in accordance with the provisions of Massachusetts General Laws, Ch. 30B for a Housing Production Plan for the Town of Brookline.

The Town of Brookline, acting by and through the Department of Planning and Community Development, seeks qualified consultants to prepare an update to its 2016 Housing Production Plan (HPP) for approval by the Select Board and Planning Board, followed by submission to the Massachusetts Department of Housing and Community Development for its approval.

Procedures under this Request for Proposals (RFP) require a separate and confidential submission of a Cost Proposal and a separate submission of a Technical Proposal. Technical Proposals will be evaluated without knowledge of prices by a committee appointed by the Chief Procurement Officer. The Chief Procurement Officer will determine the most advantageous Proposal after taking into consideration the evaluation of Technical Proposals made by the committee together with a consideration of prices set forth in the Cost Proposals.

Any questions pertaining specifically to the Scope of Services for this RFP are to be directed to: Joe Viola, Assistant Director for Community Planning, Brookline Planning and Community Development Department, 333 Washington Street, Brookline, MA 02445; telephone: (617) 730-2130; email: [jviola@brooklinema.gov](mailto:jviola@brooklinema.gov).

Any questions pertaining to the overall RFP are to be directed to David Geanakakis, Chief Procurement Officer, Purchasing Division, 333 Washington Street, Brookline, MA 02445; telephone: (617) 730-2195; fax (617) 264-6446; email: [dgeanakakis@brooklinema.gov](mailto:dgeanakakis@brooklinema.gov).

Proposals may be held open for a period of one hundred twenty (120) days from the proposal due date unless award is made sooner or the time for award is extended by consent of all parties concerned. Award, payment and performance obligations shall depend on the availability and appropriation of funds. The Town of Brookline reserves the right to reject all proposals.

## PROPOSAL SUBMISSION PROCEDURE

Proposals will be received at:

Town of Brookline  
Town Hall, Purchasing Division  
333 Washington St., 2nd Floor, Room 212  
Brookline, MA 02445

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The deadline for submission of proposals is Thursday February     ??    , 2021 at 2:00 p.m. at which time they will be opened in confidence in accordance with c. 30B, §6 (d).

Proposals submitted after that time and date will be rejected.

NOTE: Payment (Price) Proposals must be kept entirely separate from Technical Proposals. Failure to follow this instruction will result in rejection of the proposal.

**PLEASE NOTE: BROOKLINE TOWN HALL IS PARTIALLY CLOSED TO THE PUBLIC AT THIS TIME DUE TO THE COVID 19 SITUATION. IT IS PREFERRED THAT PROPOSALS ARE MAILED.**

**FOR IN PERSON DELIVERY, CONTACT (617) 730-2195 TO ARRANGE FOR PICK UP OF THE SEALED PACKAGE AT THE FRONT DOOR OF TOWN HALL.**

It is the sole responsibility of the Proposer to insure that the proposal arrives on time at the designated place.

NOTE: Cost proposals must be kept entirely separate from technical proposals. Failure to follow this instruction will result in rejection of the proposal.

### Technical Proposal shall be submitted as follows:

Each respondent shall submit eight (8) copies (1 original and 7 copies) in a separate and sealed envelope clearly marked as follows together with one electronic proposal submitted to the Chief Procurement Officer.

**Proposal Envelope A—Technical Proposal**  
**Housing Production Plan Consultant**  
**Reference # P-21-10**

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**Bidder's Name** \_\_\_\_\_

**Cost Proposal shall be submitted as follows:**

Each respondent shall submit eight (8) copies (1 original and 7 copies) in a separate and sealed envelope clearly marked as follows together with one electronic proposal submitted to the Chief Procurement Officer.

**Proposal Envelope B—Cost Proposal**  
**Housing Production Plan Consultant**  
**Reference # P-21-10**

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**Bidder's Name**\_\_\_\_\_

The Cost Proposal shall identify costs per task, including the fully burdened hourly rate of each individual assigned to each task. If modifications are proposed to the Scope of Services, the costs of said modifications should be clearly identified.

## **BACKGROUND**

The Town of Brookline, acting by and through the Department of Planning and Community Development (Planning Department), requests responses from consultants interested in updating the Town's current Housing Production Plan (HPP). Updates should be consistent with section 760 CMR 56.03(4)(e) of the Guidelines dated December 2014 issued by the Department of Housing and Community Development (DHCD) under its regulatory authority established by 760 CMR 56.00. Brookline's current HPP was approved by DHCD in October 2016 and subsequently certified in March 2017 after 272 units were added to the Town's Subsidized Housing Inventory. State-approval of the current HPP will expire on October 10, 2021.

To create the current HPP, the Planning Department, in conjunction with an HPP working group and a consultant, undertook an extensive public process and sought diverse opinions on the production and retention of affordable and market-rate housing in Brookline. The process included the utilization of a community housing survey, organized focus groups, public workshops and public meetings -- including at the Select Board, the Planning Board and the Housing Advisory Board (HAB), a Select Board-appointed committee charged with advising the Select Board on housing-related matters. The final plan benefited from frequent and varied modes of community participation and feedback. As part of this HPP update, proposers must address the Town's commitment to maximizing outreach to and robust participation of diverse constituencies despite the challenges posed by the COVID-19 pandemic.

Sixteen Comprehensive Permit ("40B") applications have been submitted to the Town during the past seven years. Shepherding these applications through the review process has involved a significant amount of Planning Department staff time as well as an extraordinary commitment by the members of the Zoning Board of Appeals (ZBA) and support by other municipal departments. As a result, since 2015, Comprehensive Permits have been issued for a total of 752 residential units, of which 204 are subject to deed restrictions in perpetuity. An additional 287 units, of which 71 are affordable, are pending before the ZBA. During that same time period, approximately 93 new non-40B housing units have been permitted by the ZBA under Chapter 40A. Therefore, approximately 1,132 units have either been permitted or are pending before the ZBA, representing a potential increase of 4.3% to the Town's existing housing stock since 2015.

On July 7, 2020, the Town's percentage of SHI-eligible housing stock reached 10.21%. As of January 2021, the Town has fallen slightly below to 9.90%. The Town anticipates that, for various reasons, the Subsidized Housing Inventory (SHI) count will fluctuate until projects are granted Certificates of Occupancy, at which point they will be permanently on the SHI. Even after the 10% benchmark is met, the Town will proactively identify other affordable housing opportunities, including potential "friendly" 40B's, with the goal of guiding both market and affordable housing development to appropriate sites that complement the integrity of the Town's residential and commercial areas.

Brookline has a longstanding commitment to creating and supporting affordable housing. The Boston Foundation's Greater Boston Housing Report Card for 2019 identifies the following six municipal "Best Practices" relating to affordable housing:

1. Multifamily Permitting
2. Accessory Dwelling Unit Bylaws
3. Inclusionary Zoning
4. Mixed-Development
5. Community Preservation Act
6. Affordable Housing Trust

Brookline currently engages in five of these six Best Practices. In fact, Brookline established one of the state's earliest affordable housing trust funds over 30 years ago. To date, the Town's Affordable Housing Trust has received nearly \$15 million and invested about \$11 million toward the creation and preservation of a wide range of affordable housing units. Regarding the one remaining Best Practice — the Community Preservation Act — the November 2020 Brookline Special Town Meeting voted to recommend adoption of the CPA in a May, 2021 voter referendum.

The Town has consistently committed municipal resources (both staff and funding) to facilitate new development and to preserve and improve existing affordable units. In addition, by adopting and applying inclusionary zoning to residential developments and through the review of 16 40B Comprehensive Permit projects, Brookline has both directly and indirectly participated in the production of affordable housing ranging from traditional public housing to creative mixed-income and mixed-use projects.

To respond to documented housing needs, both in Brookline and in Greater Boston, the Housing Production Plan update will offer continued guidance to the Town in its task to create a diverse housing supply that meets the 10% SHI goal. As critical, the plan will assist the Town in its ongoing efforts to increase the stock of affordable housing in a post-10% SHI environment. Accordingly, the Town of Brookline seeks to engage a consultant to update its HPP in order to achieve two fundamental objectives:

- Expand upon and further articulate the strategies and goals set forth in the 2016 HPP to encourage and incentivize further affordable and market-rate housing production and to retain and improve the existing affordable housing stock.
- Secure approval of the updated HPP by the Select Board and Planning Board in order to make it eligible for DHCD approval and potential certification in order to achieve a "Safe Harbor" status under Chapter 40B regulations if the Town's SHI falls or remains below 10% during the next five years.

### **SCOPE OF WORK**

The selected consultant will be required to prepare and deliver an updated HPP to the Town that is consistent with section 760 CMR 56.03(4) of the December 2014

Guidelines promulgated by DHCD and that meets the regulatory requirements for HPPs contained in 760 CMR 56.

Aside from meeting all of the required elements of an HPP, a major focus of this update will be to review, refine and expand the housing production strategies initially informed and shaped through public engagement undertaken during the preparation of the 2016 HPP. The production strategies contained in the 2016 HPP were widely accepted and supported by the public, the Select Board, Planning Board and the Housing Advisory Board. While a number of these strategies have been implemented (particularly regulatory and local policy and planning recommendations) other strategies are currently being studied and analyzed by Planning Department staff with the goal of increasing the number of square feet of housing and mixed-use development permitted each year and, in turn, enabling more opportunities to apply the Town's Inclusionary Zoning Bylaw.

The 2016 HPP and other planning documents completed by the Town will provide a great deal of information and data for use by the selected consultant. This includes: a Strategic Asset Plan (SAP) to identify and evaluate existing municipal facilities and to identify new facilities that will be needed in the next 5 to 15 years for its programmatic and service goals, including affordable housing; and, a Major Parcel Study (MPS) that identifies properties throughout Brookline that might offer development potential. The SAP and the MPS were completed following the adoption of the 2016 HPP.

Public participation is a long-standing priority of the Town of Brookline and a fundamental component of its government structure and operations. Therefore, the active and genuine engagement of all interested constituencies will be crucial in updating the current HPP. The Town is committed to insuring that the process is transparent and encourages the participation of all constituencies, particularly as it relates to the identification of public and private sites or areas that are appropriate for future housing development. Proposers should be prepared to employ public engagement strategies that will maximize accessibility to residents who will be participating remotely as a result of the COVID-19 pandemic, including the ability to run large public meetings as well as focus groups via the Zoom platform. Obviously, if circumstances improve and the restrictions on social gatherings are reduced or eliminated, the Town and the consultant will be able to adjust the approach to public engagement.

The Consultant shall be available to meet remotely with a working group consisting of representatives of the Housing Advisory Board, Planning Board, Advisory Committee ~~and~~ ~~and~~ Planning Department. These meetings, which will be conducted remotely until further notice, will be held during normal working hours. The Planning Department will administer the contract, be available to respond to questions on a daily basis, and provide administrative support in scheduling and coordinating both public and in-house meetings.

The Consultant shall comprehensively address each of the elements identified and expanded upon in the aforementioned DHCD Guidelines and undertake the following specific tasks:

**Task 1: Develop and implement a robust public engagement process that genuinely involves the public in various forums.**

The Town of Brookline is committed to engaging members of the public who have not traditionally been involved in governance. Toward that end, the Town has adopted a [Community Engagement Plan](#) reinforcing the importance of aggressively seeking out those who tend not to participate in local government. The consultant will be required to propose a public engagement plan consistent with the objectives set forth in said Community Engagement Plan.

In consultation with the HPP Working Group, the consultant shall develop and administer a robust community input process to inform the identification and development of needs, goals and strategies including but expressly not limited to:

1. Focus groups of key stakeholders and a community survey to inform needs and possible strategies to address those needs
2. At least two larger public forums to review draft goals and strategies
3. Meeting with HAB to review progress and receive feedback
4. Present final Plan to Planning Board for approval
5. Present final Plan to Select Board for approval

**Task 2: Complete an Update to the Comprehensive Housing Needs Assessment**

The Planning Department will provide existing data and plans to assist in the completion of this task. Available supporting data includes:

- 2016 Housing Production Plan
- FYs 21 - 25 CDBG and HOME Consolidated Plans
- HOME Housing Needs Assessment
- FY2016-2020 WestMetro HOME Consortium Regional Fair Housing Plan
- FY 21-25 Analysis of Impediments to Fair Housing Choice (if complete in '20)
- 2010 Census Update and recent ACS Data
- 2018 Strategic Asset Plan
- 2018 Major Parcel Study
- 2021 Multifamily Study, Brookline Regulatory Planning Division (expected)
- Planning Department documents provided from Regulatory and ED-LT Divisions—including Lower Boylston Study, when complete.
- Data from 2020 Census, to the extent that it is available
- Warrant Article 34—Special Town Meeting November, 2020

The Needs Assessment should utilize available census and other data to determine the housing needs and gaps for current Brookline residents as well as account for both town and a reasonable share of regional population growth over the next 10 years. The Needs Assessment should break down housing needs for households earning 30%,

60%, 50%, 80% and 100-120% area median income (AMI) as well as middle-income households earning up to 150% of AMI.

Additionally, the Housing Needs Assessment should identify housing needs of specific sub-populations including senior households, students, persons with disabilities, small households, and family households to determine if the current supply of housing for these sub-populations is sufficient. Included in the Needs Assessment should be an identification and acknowledgement of changing trends in housing demand.

### **Task 3: Formulate Affordable Housing Goals**

The consultant will work with the community, staff and boards to create achievable numerical goals to meet the five-year annual production goals required by HPP Guidelines as well as to meet additional longer-term housing needs identified in the Housing Needs Assessment that span the next ten years. Goals will focus on specific production goals for each of the following: extremely-low, very low, low; moderate and middle-income households; and market-rate housing. Goals should also consider specific populations such as seniors, students, persons with disabilities, small households, and family households and encourage the increased participation of racial and ethnic minority households.

### **Task 4: Update Housing Production Strategies**

As part of an update to Housing Production Strategies, the consultant should review the approved 2016 HPP and the four subcategories of strategies contained therein. The consultant should assess the effectiveness of the strategies that the Town has implemented and the extent to which they were implemented, prioritize other strategies yet to be implemented and identify new strategies that should be adopted to meet identified housing production goals. Updates to production strategies, particularly regulatory strategies, should evaluate and to the extent appropriate, incorporate the current and ongoing work of the Planning and Community Development Department's Regulatory Division. This updating should include tentative timelines within the 10-year planning horizon as well as commentary on how this and other current and anticipated planning initiatives by the Planning Department should interrelate.

Focus should be on the following key areas:

#### **1. Production of New Housing through Regulatory Changes**

These strategies shall include but not be limited to:

- a. The Multifamily Study and related Parking Demand Study coordinated by the Regulatory Division for CY 2021. As expanded upon in Appendix X, the Multifamily Study is focused on understanding how the Town's dimensional controls impede housing development; the Parking Demand Study is examining changing attitudes toward automobile usage and the implications of those changing attitudes for the market and ultimately zoning. The Multifamily Study will generate recommended zoning changes to multifamily and mixed-use zoning districts (M, L, G) to facilitate housing production and in particular affordable housing through the application of inclusionary zoning.



The Planning Department will provide timely information to the consultant relative to the Multifamily Study, the Parking Demand Study as well as other ongoing work. The Consultant shall evaluate the magnitude these zoning recommendations could have toward achieving the annual SHI-eligible housing production target of 0.5% and possibly beyond.

- b. Alternative approaches to increasing both affordable and market rate housing production such as expedited permitting under specified conditions, commercial linkage payments, density bonuses for affordable housing as a Public Benefit Incentive, waiving fees for projects that involve dedicated affordable housing, and other possible zoning incentives to encourage greater housing affordability.
- c. Continued utilization of zoning overlays and 40B to generate a variety of new housing stock, including mixed-use/mixed-income development.
- d. Other

## 2. Preservation of Existing Affordable Housing

Preservation strategies, including but not be limited to:

- a. Work with the Brookline Housing Authority (BHA) via the RAD Program and develop other strategies to respond to the needs of state-owned public housing for families.
- b. Continue use of Town-controlled funding to meet capital needs of state public housing, including CDBG and other potentially available resources.
- c. Review and strengthen restrictions on Expiring Uses. Engage with property owners in long-term planning.
- d. Continue to support resales of affordable ownership units to income-eligible households.
- e. Other

## 3. Resources and Capacity Building

These strategies should include but not be limited to:

- a. Expand existing sources of funding to support affordable housing (e.g., inclusionary zoning payments, free cash, CDBG, HOME, etc.)
- b. Explore potential new sources of funding to support affordable housing (CPA, Real Estate Transfer Tax, commercial linkage fees, etc.) With respect to linkage, evaluate the feasibility of adopting a linkage program, including the appropriate next steps required to implement linkage, and provide an overview of comparable existing linkage programs in peer communities.
- c. Expand capacity of local non-profits and developers, including Brookline's locally based CDC, to support goals of the HPP.
- d. Ensure adequate Town staff and funding to accomplish the goals of the HPP and implementation of the proposed strategies.
- e. Other

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## 4. Fair Housing and Public Education

These strategies should include but not be limited to:

- a. Continued public education related to affordable housing
- b. Promote use of housing forums, use of social media, community cable TV, newsletters/publications, as well as tours of successful development projects.
- c. Continue trainings to specific stakeholders on key aspects of Fair Housing.
- d. Other

**Task 5: Develop and test specific location-based recommendations for housing production, including zoning recommendations**

Warrant Article 34, a Resolution adopted at the November 2020 Brookline Special Town Meeting, urges the Town to engage in a planning process to expand on the specific analyses and recommendations of 2016 Housing Production Plan. The planning process will include evaluation of whether recommended changes to the zoning by-law to encourage and incentivize additional housing units takes account of the fiscal and community impacts, including costs for public services and infrastructure generated by new potential development under such zoning changes. In keeping with Warrant Article 34, the consultant will complete a two-pronged task as follows:

1. Develop location-based housing and mixed-used development scenarios that will inform the process of establishing town-wide housing production goals, both multi-year and annual; and
2. Apply a methodology that will help the Town to understand fiscal and community impacts

As a means of projecting a range of achievable town-wide five-year and broader ten-year housing production goals, the consultant, in consultation with the HPP working group, will identify individual locations deemed to be potential candidates for new housing development. Such locations will include:

1. Discrete segments of mixed-use corridors including, but not necessarily limited to, those identified in the Town's 2016 Housing Production Plan;
2. "Opportunity Nodes" consisting of multiple parcels including, but not necessarily limited to, those identified in the Town's 2016 Housing Production Plan; that may be appropriate for new market rate and affordable housing development; and
3. Major individual parcels owned by the Town or by private institutions

The total number of discrete geographic locations to be evaluated should be not less than 12 or more than 20. (Respondents are encouraged to address this range in the Technical Proposal and, if the response has implications for cost, in the Cost Proposal.)

Completion of this Task will include the following:

**Comment [JV1]:** Change added to address Select Board member Heller's comment about accounting for costs from development

1. Consider a range of development scenarios for each of the above-described potential housing development locations that would allow the Town to increase its low- and moderate-income year round housing units (as counted on the SHI) in an amount equal to or greater than 0.5% of the housing stock (131 units/year per the 2010 census). The consultant shall also project the number of non-SHI eligible units that could be generated under the various scenarios. Definitions should include brief descriptive narrative and rationale; key applicable metrics (e.g., average FAR, total development square footage, housing mix, single vs. mixed use); and visioning tools to be used for both public engagement and the final Report.
2. Examine the Fiscal Impact and Buildout Model (FIBM) developed by the Harvard College Consulting Group for the Town and consider its potential suitability, including possible enhancements by the consultant (e.g. GIS interface, 3-dimensional software), to aid in producing the needed development and visioning scenarios, including projected fiscal impact, for each of the above-described potential housing development locations. (For further description of the FIBM, see Appendix XX)
3. Produce a town-wide map or maps that depict these housing development opportunity locations;
4. Produce a preliminary range of development scenarios for mixed-income housing; illustrate a range of potential housing unit production for each of the above-defined individual development opportunity locations and utilize basic models to depict massing under the various location-specific scenarios;
5. Evaluate and refine preliminary scenarios and projections, taking account of public input and other planning considerations, e.g., transportation, and accessibility, alternative public and private uses, neighborhood compatibility (scale and use), climate sustainability, commercial area vitality, public safety, open space, fiscal impact and other identified planning and citizen recommendations.
6. Recommend specific re-zoning or zoning overlays that could achieve the targeted range of new housing units, as appropriate, for each of these identified locations, based upon model scenario output and public discussion. (NOTE: This task does not include any project specifications or preparation of detailed zoning articles.)

## PROJECT SCHEDULE

The consultant shall complete its work within nine months from notice to proceed. During said time, the consultant shall present preliminary findings following approximately six months. Each respondent must address the issue of project schedule in its Technical Proposal, provide benchmarks for completion of specific tasks, and, if

warranted, provide an alternative schedule including benchmarks together with an explanation.

## DELIVERABLES

The consultant shall provide the following deliverables to the Town:

- Power point presentations as well as other collateral material for each of the public meetings identified above
- Twenty bound copies of the Housing Production Plan, including a separate stand-alone Executive Summary, in both written and electronic format
- Specifications of any model that the consultant may create to generate development scenarios, fiscal analyses and/or housing production projections

## PROPOSAL CONTENTS

### I. Technical Proposal

A. The technical proposal shall contain, at a minimum, the following:

1. Letter of interest
2. Proposal interest form
3. At least three relevant references, including contact name, phone number, e-mail address, and nature of project work. For the Proposer (including any proposed subcontractors), a biography describing the proposer's history, location(s), legal composition, ownership, organizational structure and key staff; evidence of prior experience with completed projects of a similar scope and magnitude; information regarding the type of other projects and developments including location and dollar value; and history of working with neighborhood groups and local officials in a major planning project.
4. Background information on each team member including resume, relevant experience, proposed role in the development of the Housing Production Plan, and extent to which s/he has worked with other team members.
5. Certificate of Authority (if the proposer is a corporation).
- ~~5-6.~~ Demographic data on the firm or the team that shows the number of individuals who are African American or African descent, Hispanic, East Asian, South Asian, and other. The data must also show the number of individuals who are women. The data must show the number of individuals who are in ownership, management, or administrative positions and separately, the numbers who are in other positions in the firm or the team (the foregoing called herein, the "Demographic Data").

**Comment [JV2]:** Addition from Select Board  
Chair Bernard Greene

B. The Technical Proposal should also include:

1. A discussion of the Scope of Work that indicates an understanding of the scope and methodology, and how the Respondent proposes to respond to the

overall objective of creating an HPP that will be eligible for approval by DHCD and will be implementable by the Town.

Respondents are encouraged to include in their Technical Proposals a discussion of alternative and/or supplemental approaches based on their experience and best professional judgment in preparing effective Housing Production Plans. The Cost Proposal shall identify the costs associated with these alternative and/or supplemental approaches, if any.

2. A Public Engagement Plan that responds to the Town's commitment to undertaking robust, inclusive and meaningful participation. This plan should include a discussion of the public participation process considering the limitations on public gatherings including expanding upon the basic parameters provided in the above scope with the understanding that genuine public participation involving a wide range of constituencies is critical to the long-term success of the Housing Production Plan.

Respondents are encouraged to include in their Technical Proposals a discussion of alternative and/or supplemental approaches based on their experience and best professional judgment to involve the public in difficult and potentially controversial land use issues. The Cost Proposal shall identify the costs associated with these alternative and/or supplemental approaches, if any.

3. A timeline identifying the amount of time allocated to each task, including a total timeframe for performance of the Scope of Services.

## **EVALUATION OF PROPOSALS**

### **Minimum Evaluation Criteria**

The Chief Procurement Officer (CPO) shall review all responses to ensure that each proposal includes the following aforementioned material, which shall constitute the Minimum Evaluation Criteria:

- Letter of interest
- Proposal interest form
- At least three relevant references, including contact name, phone number, e-mail address, and nature of project work. For the Proposer (including any proposed subcontractors), a biography describing the proposer's history, location(s), legal structure, ownership, organizational structure and key staff; evidence of prior experience with completed projects of a similar scope and magnitude; information regarding the type of other projects and developments including location and dollar value; and history of working with neighborhood groups and local officials in a major planning project.
- Background information on each team member including resume, relevant experience, proposed role in the creation of a Housing Production Plan, and extent to which s/he has worked with other team members.

- Certificate of Authority (if the proposer is a corporation)
- The Demographic Data.

All Technical Proposals that the CPO determines meet said minimum evaluation criteria shall be referred to an Evaluation Committee, appointed by the CPO.

### Comparative Evaluation Criteria

Each proposal referred to the Evaluation Committee by the CPO shall be rated according to the following comparative evaluation criteria. Each of the criteria will be weighted equally.

#### Criterion: Proposer's approach to enhancing diversity in assembling a team

Highly advantageous: The proposer's lead or co-lead consultant for this project qualifies as a Disadvantaged Business Enterprise (DBE) and is certified by the Commonwealth of Massachusetts Supplier Diversity Office (SDO). The proposal includes a clear description of the DBE's role as the lead/co-lead consultant and their involvement is specific project-related tasks.

Advantageous: The consultant's team for this project includes sub-consultant(s) that qualify as a Disadvantaged Business Enterprise (DBE) and is/are certified by the Commonwealth of Massachusetts Supplier Diversity Office (SDO). The proposal includes a clear description of the DBE's role as a sub-consultants and their involvement in specific project-related tasks.

Not Advantageous: The consultant's team for this project neither includes a lead/co-lead consultant nor sub-consultants that qualify as a Disadvantaged Business Enterprise (DBE), as certified by the Commonwealth of Massachusetts Supplier Diversity Office (SDO).

~~The proposal may use the Demographic Data as an enhancement or replacement for the above criteria if the Demographic Data shows that the firm or firms that comprise the team use effective equal opportunity/affirmative action hiring, retention, and promotion practices. The CPO will evaluate the Demographic Data to ensure that it shows employment practices that, to a reasonable degree, reflect the demographic data of the Boston metropolitan area.~~

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**Comment [JV3]:** Deleted per Town Counsel

#### Criterion: Quality and breadth of proposal and understanding of the complexity of the task

Highly advantageous: Application is clear, well-organized and expands upon the content of the RFP to indicate a full grasp of the issues involved.

Advantageous: Application is generally clear, reasonably well-organized but fails to indicate a full understanding and grasp of the issues involved.

Not Advantageous: Application is not clear and/or not well-organized and fails to indicate an understanding and grasp of the issues involved.

Criterion: The breadth and extent of experience of the team members in preparing DHCD-approved Housing Production Plans

Highly advantageous: Key members of the professional team members have direct and applicable experience in preparing at least two Housing Production Plans.

Advantageous: At least one of the professional team members has prepared at least one Housing Production Plan.

Not Advantageous: None of the professional team members has experience in preparing a Housing Production Plan.

Criterion: The breadth and extent of experience in and knowledge of regulatory and land use planning in Massachusetts, including but not necessarily limited to Chapters 40A, 40B, 40R and 40S.

Highly advantageous: Key members of the professional team has extensive experience and proven ability in applying and/or drafting Massachusetts land use statutes, by-laws/ordinances or regulations.

Advantageous: Key members of the professional team has limited experience with Massachusetts land use statutes, by-laws/ordinances or regulations.

Not Advantageous: Key members of the professional team has no experience with Massachusetts land use statutes, by-laws/ordinances or regulations.

Criterion: Knowledge of and experience with real estate development and affordable housing issues, including but not limited to funding sources for subsidized housing

Highly advantageous: Key members of the professional team has extensive knowledge of and experience with real estate development and affordable housing issues.

Advantageous: Key members of the professional team has limited knowledge of and/or experience with real estate development and affordable housing issues.

Not Advantageous: Key members of the professional team has no knowledge or experience with real estate development and affordable housing issues

Criterion: The breadth and extent of knowledge of and experience with policies to promote affordable housing and the financing of affordable housing projects and programs.

Highly advantageous: Key members of the professional team have extensive knowledge of and experience with affordable housing policies and the financing of affordable housing projects and programs.

Advantageous: Key members of the professional team have limited knowledge of and experience with affordable housing policies and the financing of affordable housing projects and programs.

Not Advantageous: Key members of the professional team have no knowledge of or experience with policies to promote affordable housing and the financing of affordable housing projects and programs.

Criterion: Proven experience in designing and undertaking robust public participation processes

Highly advantageous: Key members of the team has experience in designing and implementing a complex public participation process in at least one community that places a high priority on transparent and inclusive planning projects.

Advantageous: At least one member of the team has been involved in facilitating a public participation process associated with a major planning study.

Not Advantageous: None of the members of the professional team has experience in developing and implementing a strong public participation process.

**Evaluation Committee**

An Evaluation Committee shall be established by the Chief Procurement Officer.

The Evaluation Committee shall apply the Comparative Criteria, set forth above, to each proposal. Based on the presentation and written Technical Proposal submitted, the Evaluation Committee shall rate each proposal as: highly advantageous, advantageous, or unacceptable, in accordance with the provisions of M.G.L. Chapter 30B.

Following review of the Technical Proposals, the Evaluation Committee may, at its discretion, schedule individual interviews with any or all of the proposers for the purpose of further evaluation of a proposer's qualifications and ability to provide the required services. It is anticipated that these interviews will be conducted remotely.

Based on its review of the Technical Proposals, interviews, and Cost Proposals, the Evaluation Committee will make a recommendation to the Chief Procurement Officer for the award of a contract to the selected consultant.

The Town reserves the right to adjust the proposed plan of work and/or the proposed cost submitted by the selected consultant. The Town further reserves the right to reject all proposals and to not enter into a contract to prepare a Housing Production Plan.



**BASIC CONTRACTUAL REQUIREMENTS**

The Town may enter into a contract with the selected Respondent. Said contract will contain, at a minimum, the following basic provisions:

**Hold Harmless Agreement:**

The successful Bidder agrees to defend, pay on behalf of, indemnify and hold harmless the Town of Brookline, its officers and employees from any and all claims and damages of every kind and nature made, rendered or incurred by or in behalf of every person or corporation whatsoever, including the parties hereto and their employees that may arise, occur, or grow out of any acts, actions, work or other activity done by the successful Bidder, its employees, subcontractors or any independent contractors working under the direction of either the successful Bidder or subcontractor in the performance of this contract.

**Workers Compensation Insurance:**

The successful Bidder shall carry and maintain during the term of this contract, workers compensation and employers liability insurance meeting the requirements of the Massachusetts Workers Compensation Law on all the successful Bidder's employees carrying out the work involved in this contract.

**General Liability Insurance:**

The successful Bidder shall carry and maintain during the term of this contract, general liability insurance on a per occurrence basis with limits of liability not less than \$1,000,000 per occurrence for Bodily Injury and Property Damage. As a minimum, coverage for Premises, Operations, Products and Completed Operations shall be included. This coverage shall protect the public or any person from injury or property damages sustained by reason of the successful Bidder or its employees carrying out the work involved in this contract.

**Automobile Liability Insurance:**

The successful Bidder shall carry and maintain during the term of this contract, automobile liability insurance with either a combined limit of at least \$1,000,000 per occurrence for bodily injury and property damage or split limits of at least \$1,000,000 for bodily injury per person per occurrence and \$1,000,000 for property damage per occurrence. Coverage shall include all owned, hired, and non-owned motor vehicles used in the performance of this contract by the successful Bidder or its employees.

**Subcontractors:** In the case of any work sublet, the successful Bidder shall require subcontractors and independent contractors working under the direction of either the successful Bidder or a subcontractor to carry and maintain the same workers compensation and liability insurance required of the successful Bidder.

**Additional Insured:**

The Town of Brookline, its officials and employees shall be named as additional insureds without restrictions on the successful Bidder's, subcontractor's, and independent contractor's liability insurance policies and certificates of insurance.

**Proof of Insurance:**

The successful Bidder shall furnish the Town of Brookline with Certificates of Insurance and a copy of the policies if requested by the Town. The name of the project or contract to be covered must be listed on the certificates of insurance. Before commencing any performance under this Contract, the successful Bidder shall deliver all the Certificates of Insurance to the Town certifying that the policies stipulated above are in full force and effect.

**Insurance Cancellation or Material Change Notice:**

The certificates of insurance shall state that the insurance company will provide thirty (30) days written notice prior to cancellation, non-renewal, or material change including reduction of insurance coverage or limits. The notice will be sent to the Town of Brookline, Purchasing Division, 333 Washington Street, Brookline, MA 02445, via certified mail.

**TOWN OF BROOKLINE, MASSACHUSETTS  
PURCHASING DIVISION  
333 WASHINGTON STREET  
BROOKLINE, MA 02445**

**REQUEST FOR PROPOSAL**

**Housing Production Plan Consultant**

**PRICE PROPOSAL**

**TO BE SUBMITTED IN SEPARATE ENVELOPE B**

Selection of a Respondent to perform this professional study will be based upon qualifications, experience, historical performance record, understanding of needs, price, suggested innovations, and the Respondent's proven capabilities. In addition to the data and documentation being submitted by the Respondent in response to this request, the municipality will also rely on information received from the references submitted with proposal.

Bidder's Name: \_\_\_\_\_

Name of Individual or Company Making Proposal

The prices quoted and totaled below include the cost of all labor, materials, insurance, and all other necessary expenses to fulfill the conditions of the contract. All travel costs to be incurred by the contractor shall be paid by contractor.

The following detailed price proposal is based upon the Scope of Services. Consultants are encouraged, where appropriate, to propose creative, innovative and cost-effective approaches to the Scope of Services. The Technical Proposal and Price Proposal may reflect modifications or alternative approaches to the general Scope of Services.

**TOTAL PRICE**

\$ \_\_\_\_\_

The Town of Brookline reserves the right to choose any or all of the phases or tasks to be resulting from this RFP. **Vendors MUST provide pricing on all phases and tasks.** Some of the phases and tasks may not be awarded and deleted phases and tasks may be assumed by the Town.

**TOWN OF BROOKLINE, MASSACHUSETTS  
PURCHASING DIVISION  
333 WASHINGTON STREET  
BROOKLINE, MA 02445**

**REQUEST FOR PROPOSAL**

**Housing Production Plan Consultant**

**PROPOSAL SIGNATURE FORM**

**THIS FORM IS TO BE SUBMITTED IN ENVELOPE A - TECHNICAL PROPOSAL**

The undersigned, hereafter called the proposer, having fully familiarized him/herself with the entire Request for Proposal documents, hereby agrees and declares:

1. That prices inserted in the Price Proposal (Envelope A) cover all necessary expenses to fulfill the conditions of the contract within the time stated.
2. Pursuant to M.G.L. c. 62C, § 49A, the proposer hereby certifies that the proposer has filed all state tax returns and paid all state taxes required under law.
3. The undersigned certifies under penalties of perjury that this proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity or group of individuals.

The following items are to be completed by the Proposer, if applicable:

Our Company is:      A Corporation      \_\_\_\_\_  
                               A Partnership      \_\_\_\_\_  
                               Individually Owned      \_\_\_\_\_  
                               Other (specify)      \_\_\_\_\_

Company Name: \_\_\_\_\_

Social Security or Federal Identification Number: \_\_\_\_\_

Signature of Individual or Authorized Official: \_\_\_\_\_

Title of said Individual or Official: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone Number: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

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**DRAFT 2-11-2021**

**TOWN OF BROOKLINE - PURCHASING DIVISION**  
**333 Washington Street Brookline, Massachusetts 02445**

**REQUEST FOR PROPOSALS**  
**HOUSING PRODUCTION PLAN CONSULTANT**

**GENERAL**

Competitive sealed proposals are invited in accordance with the provisions of Massachusetts General Laws, Ch. 30B for a Housing Production Plan for the Town of Brookline.

The Town of Brookline, acting by and through the Department of Planning and Community Development, seeks qualified consultants to prepare an update to its 2016 Housing Production Plan (HPP) for approval by the Select Board and Planning Board, followed by submission to the Massachusetts Department of Housing and Community Development for its approval.

Procedures under this Request for Proposals (RFP) require a separate and confidential submission of a Cost Proposal and a separate submission of a Technical Proposal. Technical Proposals will be evaluated without knowledge of prices by a committee appointed by the Chief Procurement Officer. The Chief Procurement Officer will determine the most advantageous Proposal after taking into consideration the evaluation of Technical Proposals made by the committee together with a consideration of prices set forth in the Cost Proposals.

Any questions pertaining specifically to the Scope of Services for this RFP are to be directed to: Joe Viola, Assistant Director for Community Planning, Brookline Planning and Community Development Department, 333 Washington Street, Brookline, MA 02445; telephone: (617) 730-2130; email: [jviola@brooklinema.gov](mailto:jviola@brooklinema.gov)

Any questions pertaining to the overall RFP are to be directed to David Geanakakis, Chief Procurement Officer, Purchasing Division, 333 Washington Street, Brookline, MA 02445; telephone: (617) 730-2195; fax (617) 264-6446; email: [dgeanakakis@brooklinema.gov](mailto:dgeanakakis@brooklinema.gov)

Proposals may be held open for a period of one hundred twenty (120) days from the proposal due date unless award is made sooner or the time for award is extended by consent of all parties concerned. Award, payment and performance obligations shall depend on the availability and appropriation of funds. The Town of Brookline reserves the right to reject all proposals.

## PROPOSAL SUBMISSION PROCEDURE

Proposals will be received at:

Town of Brookline  
Town Hall, Purchasing Division  
333 Washington St., 2nd Floor, Room 212  
Brookline, MA 02445

The deadline for submission of proposals is Thursday February\_\_\_\_, 2021 at 2:00 p.m. at which time they will be opened in confidence in accordance with c. 30B, §6 (d).

Proposals submitted after that time and date will be rejected.

NOTE: Payment (Price) Proposals must be kept entirely separate from Technical Proposals. Failure to follow this instruction will result in rejection of the proposal.

**PLEASE NOTE: BROOKLINE TOWN HALL IS PARTIALLY CLOSED TO THE PUBLIC AT THIS TIME DUE TO THE COVID 19 SITUATION. IT IS PREFERRED THAT PROPOSALS ARE MAILED.**

**FOR IN PERSON DELIVERY, CONTACT (617) 730-2195 TO ARRANGE FOR PICK UP OF THE SEALED PACKAGE AT THE FRONT DOOR OF TOWN HALL.**

It is the sole responsibility of the Proposer to insure that the proposal arrives on time at the designated place.

NOTE: Cost proposals must be kept entirely separate from technical proposals. Failure to follow this instruction will result in rejection of the proposal.

### **Technical Proposal shall be submitted as follows:**

Each respondent shall submit eight (8) copies (1 original and 7 copies) in a separate and sealed envelope clearly marked as follows together with one electronic proposal submitted to the Chief Procurement Officer.

**Proposal Envelope A—Technical Proposal**

**Housing Production Plan Consultant**

**Reference # P-21-10**

**Bidder's Name**\_\_\_\_\_

### **Cost Proposal shall be submitted as follows:**

Each respondent shall submit eight (8) copies (1 original and 7 copies) in a separate and sealed envelope clearly marked as follows together with one electronic proposal submitted to the Chief Procurement Officer.

**Proposal Envelope B—Cost Proposal**

**Housing Production Plan Consultant**

**Reference # P-21-10**

**Bidder's Name** \_\_\_\_\_

The Cost Proposal shall identify costs per task, including the fully burdened hourly rate of each individual assigned to each task. If modifications are proposed to the Scope of Services, the costs of said modifications should be clearly identified.

**BACKGROUND**

The Town of Brookline, acting by and through the Department of Planning and Community Development (Planning Department), requests responses from consultants interested in updating the Town's current Housing Production Plan (HPP). Updates should be consistent with section 760 CMR 56.03(4)(e) of the Guidelines dated December 2014 issued by the Department of Housing and Community Development (DHCD) under its regulatory authority established by 760 CMR 56.00. Brookline's current HPP was approved by DHCD in October 2016 and subsequently certified in March 2017 after 272 units were added to the Town's Subsidized Housing Inventory. State-approval of the current HPP will expire on October 10, 2021.

To create the current HPP, the Planning Department, in conjunction with an HPP working group and a consultant, undertook an extensive public process and sought diverse opinions on the production and retention of affordable and market-rate housing in Brookline. The process included the utilization of a community housing survey, organized focus groups, public workshops and public meetings -- including at the Select Board, the Planning Board and the Housing Advisory Board (HAB), a Select Board-appointed committee charged with advising the Select Board on housing-related matters. The final plan benefited from frequent and varied modes of community participation and feedback. As part of this HPP update, proposers must address the Town's commitment to maximizing outreach to and robust participation of diverse constituencies despite the challenges posed by the COVID-19 pandemic.

Sixteen Comprehensive Permit ("40B") applications have been submitted to the Town during the past seven years. Shepherding these applications through the review process has involved a significant amount of Planning Department staff time as well as an extraordinary commitment by the members of the Zoning Board of Appeals (ZBA) and support by other municipal departments. As a result, since 2015, Comprehensive Permits have been issued for a total of 752 residential units, of which 204 are subject to deed restrictions in perpetuity. An additional 287 units, of which 71 are affordable, are pending before the ZBA. During that same time period, approximately 93 new non-40B housing units have been permitted by the ZBA under Chapter 40A. Therefore, approximately 1,132 units have either been permitted or are pending before the ZBA, representing a potential increase of 4.3% to the Town's existing housing stock since 2015.

On July 7, 2020, the Town's percentage of SHI-eligible housing stock reached 10.21%. As of January 2021, the Town has fallen slightly below to 9.90%. The Town anticipates that, for various reasons, the Subsidized Housing Inventory (SHI) count will fluctuate until projects are granted Certificates of Occupancy, at which point they will be permanently on the SHI. Even after the 10% benchmark is met, the Town will proactively identify other affordable housing opportunities, including potential "friendly" 40B's, with the goal of guiding both market and affordable housing development to appropriate sites that complement the integrity of the Town's residential and commercial areas.

Brookline has a longstanding commitment to creating and supporting affordable housing. The Boston Foundation's Greater Boston Housing Report Card for 2019 identifies the following six municipal "Best Practices" relating to affordable housing:



1. Multifamily Permitting
2. Accessory Dwelling Unit Bylaws
3. Inclusionary Zoning
4. Mixed-Development
5. Community Preservation Act
6. Affordable Housing Trust

Brookline currently engages in five of these six Best Practices. In fact, Brookline established one of the state's earliest affordable housing trust funds over 30 years ago. To date, the Town's Affordable Housing Trust has received nearly \$15 million and invested about \$11 million toward the creation and preservation of a wide range of affordable housing units. Regarding the one remaining Best Practice — the Community Preservation Act — the November 2020 Brookline Special Town Meeting voted to recommend adoption of the CPA in a May, 2021 voter referendum.

The Town has consistently committed municipal resources (both staff and funding) to facilitate new development and to preserve and improve existing affordable units. In addition, by adopting and applying inclusionary zoning to residential developments and through the review of 16 40B Comprehensive Permit projects, Brookline has both directly and indirectly participated in the production of affordable housing ranging from traditional public housing to creative mixed-income and mixed-use projects.

To respond to documented housing needs, both in Brookline and in Greater Boston, the Housing Production Plan update will offer continued guidance to the Town in its task to create a diverse housing supply that meets the 10% SHI goal. As critical, the plan will assist the Town in its ongoing efforts to increase the stock of affordable housing in a post-10% SHI environment. Accordingly, the Town of Brookline seeks to engage a consultant to update its HPP in order to achieve two fundamental objectives:

- Expand upon and further articulate the strategies and goals set forth in the 2016 HPP to encourage and incentivize further affordable ~~housing and market rate housing production~~ and to retain and improve the existing affordable housing stock.
- Secure approval of the updated HPP by the Select Board and Planning Board in order to make it eligible for DHCD approval and potential certification in order to achieve a "Safe Harbor" status under Chapter 40B regulations if the Town's SHI falls or remains below 10% during the next five years.

**Comment [Office1]:** This is a problem. This is not a Town adopted policy, as illustrated by the fact that WA 34 said an indepth analysis was required to determine whether or not such a policy was in the Town's best interest.

### SCOPE OF WORK

The selected consultant will be required to prepare and deliver an updated HPP to the Town that is consistent with section 760 CMR 56.03(4) of the December 2014 Guidelines promulgated by DHCD and that meets the regulatory requirements for HPPs contained in 760 CMR 56.

Aside from meeting all of the required elements of an HPP, a major focus of this update will be to review, refine and expand the housing production strategies initially informed and shaped through public engagement undertaken during the preparation of the 2016 HPP. The production strategies contained in the 2016 HPP were widely accepted and supported by the public, the Select Board, Planning Board and the Housing Advisory Board. While a number of these strategies have been implemented (particularly regulatory and local policy and planning recommendations) other strategies are currently being studied and analyzed by Planning Department staff that could result in an increase in the number of square feet of housing and mixed-use development permitted each year, which would, in turn, be subject to the and, in turn, enabling more opportunities to apply the Town's Inclusionary Zoning Bylaw.

**Comment [Office2]:** Again, this is not a Town goal. It's a joke to say that to get more affordable housing we will redevelop our commercial areas to add HOUSING and that this someone is affordable housing because we have inclusionary requirements.

The 2016 HPP and other planning documents completed by the Town will provide a great deal of information and data for use by the selected consultant. This includes: a Strategic Asset Plan (SAP) to identify and evaluate existing municipal facilities and to identify new facilities that will be needed in the next 5 to 15 years for its programmatic and service goals, including affordable housing; and, a Major Parcel Study (MPS) that identifies properties throughout Brookline that might offer development potential. The Parks, Recreation and Open Space Strategic Plan is currently being updated which identifies Town wide deficiencies, per capita metrics and needs. The HPP should consider these needs in its planning and recommendations. The SAP and the MPS were completed following the adoption of the 2016 HPP.

Public participation is a long-standing priority of the Town of Brookline and a fundamental component of its government structure and operations. Therefore, the active and genuine engagement of all interested constituencies will be crucial in updating the current HPP. The Town is committed to insuring that the process is transparent and encourages the participation of all constituencies, particularly as it relates to the identification of public and private sites or areas that are appropriate for future housing development. The consultant must engage those residents and business owners who would be most impacted by any proposed zoning changes, with accurate and detailed illustrations and assessment of impacts. Proposers should be prepared to employ public engagement strategies that will maximize accessibility to residents who will be participating remotely as a result of the COVID-19 pandemic, including the ability to run large public meetings as well as focus groups via the Zoom platform. Obviously, if circumstances improve and the restrictions on social gatherings are reduced or eliminated, the Town and the consultant will be able to adjust the approach to public engagement.

The Consultant shall be available to meet remotely with a working group consisting of representatives of the Housing Advisory Board, Planning Board and Planning Department and Advisory Committee. These meetings, which will be conducted remotely until further notice, will be held during normal working hours. The Planning Department will administer the contract, be available to respond to questions on a daily basis, and provide administrative support in scheduling and coordinating both public and in-house meetings.

The Consultant shall comprehensively address each of the elements identified and

expanded upon in the aforementioned DHCD Guidelines and undertake the following specific tasks:

**Task 1: Develop and implement a robust public engagement process that genuinely involves the public in various forums.**

The Town of Brookline is committed to engaging members of the public who have not traditionally been involved in governance. Toward that end, the Town has adopted a [Community Engagement Plan](#) reinforcing the importance of aggressively seeking out those who tend not to participate in local government. The consultant will be required to propose a public engagement plan consistent with the objectives sent forth in said Community Engagement Plan.

In consultation with the HPP Working Group, the consultant shall develop and administer a robust community input process to inform the identification and development of needs, goals and strategies including but expressly not limited to:

1. Focus groups of key stakeholders and a community survey to inform needs and possible strategies to address those needs
2. At least two larger public forums to review draft goals and [strategies with community engagement strategies to include those most impacted.](#)
3. Meeting with HAB to review progress and receive feedback
4. Present final Plan to Planning Board for approval
5. Present final Plan to Select Board for approval

**Comment [Office3]:** These strategies are not soliciting feedback on specific place-based proposals. By being vague and general, such input

**Task 2: Complete an Update to the Comprehensive Housing Needs Assessment**

The Planning Department will provide existing data and plans to assist in the completion of this task. Available supporting data includes:

- 2016 Housing Production Plan
- FYs 21 - 25 CDBG and HOME Consolidated Plans
- HOME Housing Needs Assessment
- FY2016-2020 WestMetro HOME Consortium Regional Fair Housing Plan
- FY 21-25 Analysis of Impediments to Fair Housing Choice (if complete in '20)
- 2010 Census Update and recent ACS Data
- 2018 Strategic Asset Plan
- 2018 Major Parcel Study
- 2021 Multifamily Study, Brookline Regulatory Planning Division (expected)
- Planning Department documents provided from Regulatory and ED-LT Divisions—including Lower Boylston Study, when complete.
- Data from 2020 Census, to the extent that it is available
- Warrant Article 34—Special Town Meeting November, 2020

The Needs Assessment should utilize available census and other data to determine the housing needs and gaps for current Brookline residents as well as account for both town and a reasonable share of regional population growth. [Regional population growth forecasts must be based on current conditions looking forward 10 years from today. - over the next 10 years.](#) The Needs Assessment should break down housing needs for households earning 30%, 60%, 50%, 80% and 100-120% area median income (AMI) as well as middle-income households earning up to 150% of AMI.

**Comment [Office4]:** The regional housing production goals were based on an assumption that the employment growth that happened in the Boston region between 2010-2015 would continue at the same rate until 2030. This is no longer a reasonable assumption. Any forecast must be based on current conditions, not past forecasts.

Additionally, the Housing Needs Assessment should identify housing needs of specific sub-populations including senior households, students, persons with disabilities, small households, and family households to determine if the current supply of housing for these sub-populations is sufficient. Included in the Needs Assessment should be an identification and acknowledgement of changing trends in housing demand.

### **Task 3: Formulate Affordable Housing Goals**

The consultant will work with the community, staff and boards to create achievable numerical goals to meet the five-year annual production goals required by HPP Guidelines as well as to meet additional longer-term housing needs identified in the Housing Needs Assessment that span the next ten years. Goals will focus on specific production goals for each of the following: extremely-low, very low, low; moderate and middle-income households; and market-rate housing. Goals should also consider specific populations such as seniors, students, persons with disabilities, small households, and family households and encourage the increased participation of racial and ethnic minority households.

### **Task 4: Update Housing Production Strategies**

As part of an update to Housing Production Strategies, the consultant should review the approved 2016 HPP and the four subcategories of strategies contained therein. The consultant should assess the effectiveness of the strategies that the Town has implemented and the extent to which they were implemented, prioritize other strategies yet to be implemented and identify new strategies that ~~cs~~ should be adopted to meet identified housing production goals. Updates to production strategies, particularly regulatory strategies, should evaluate and to the extent appropriate, incorporate the current and ongoing work of the Planning and Community Development Department's Regulatory Division. This updating should include tentative timelines within the 10-year planning horizon as well as commentary on how this and other current and anticipated planning initiatives by the Planning Department should interrelate.

Focus should be on the following key areas:

#### **1. Production of New Housing through Regulatory Changes**

These strategies shall include but not be limited to:

- a. The Multifamily Study and related Parking Demand Study coordinated by the Regulatory Division for CY 2021. As expanded upon in Appendix X, the Multifamily Study is focused on understanding how the Town's dimensional controls impede housing development; the Parking Demand Study is examining changing attitudes toward automobile usage and the implications of those changing attitudes for the market and ultimately zoning. The Multifamily Study will generate recommended zoning changes to multifamily and mixed-use zoning districts (M, L, G) to facilitate housing production and in particular affordable housing through the application of inclusionary zoning. The Planning Department will provide timely information to the consultant relative to the Multifamily Study, the Parking Demand Study as well as other ongoing work. The Consultant shall evaluate the magnitude these zoning

**Comment [Office5]:** Claiming that market rate housing production is "affordable" because it contains inclusionary units misses the massive increase in housing costs that "new" housing represents.

recommendations could have toward achieving the annual SHI-eligible housing production target of 0.5% and possibly beyond. [The consultant will also assess the impacts and potential displacement that redevelopment might have on our existing, older housing stock which currently provides moderate income housing. Potential displacement of existing businesses must also be assessed.](#)

- b. Alternative approaches to increasing both affordable and market rate housing production such as expedited permitting under specified conditions, commercial linkage payments, density bonuses for affordable housing as a Public Benefit Incentive, waiving fees for projects that involve dedicated affordable housing, and other possible zoning incentives to encourage greater housing affordability.
- c. Continued utilization of zoning overlays and [friendly 40B that is appropriately scaled for its setting](#), to generate a variety of new housing stock, including mixed-use/mixed-income development.
- d. Other

## 2. Preservation of Existing Affordable Housing

Preservation strategies, including but not be limited to:

- a. Work with the Brookline Housing Authority (BHA) via the RAD Program and develop other strategies to respond to the needs of state-owned public housing for families.
- b. Continue use of Town-controlled funding to meet capital needs of state public housing, including CDBG and other potentially available resources.
- c. Review and strengthen restrictions on Expiring Uses. Engage with property owners in long-term planning.
- d. Continue to support resales of affordable ownership units to income-eligible households.
- e. Other

## 3. Resources and Capacity Building

These strategies should include but not be limited to:

- a. Expand existing sources of funding to support affordable housing (e.g., inclusionary zoning payments, free cash, CDBG, HOME, etc.)
- b. Explore potential new sources of funding to support affordable housing (CPA, Real Estate Transfer Tax, commercial linkage fees, etc.) With respect to linkage, evaluate the feasibility of adopting a linkage program, including the appropriate next steps required to implement linkage, and provide an overview of comparable existing linkage programs in peer communities.
- c. Expand capacity of local non-profits and developers, including Brookline's locally based CDC, to support goals of the HPP.
- d. Ensure adequate Town staff and funding to accomplish the goals of the HPP and implementation of the proposed strategies.
- e. Other

4. Fair Housing and Public Education

These strategies should include but not be limited to:

- a. Continued public education related to affordable housing
- b. Promote use of housing forums, use of social media, community cable TV, newsletters/publications, as well as tours of successful development projects.
- c. Continue trainings to specific stakeholders on key aspects of Fair Housing.
- d. Other

**Task 5: Develop and test specific location-based recommendations for housing production, including zoning recommendations**

Warrant Article 34, a Resolution adopted at the November 2020 Brookline Special Town Meeting, urges the Town to engage in a planning process to expand on the specific analyses and recommendations of 2016 Housing Production Plan. The planning process will include evaluation of whether recommended changes to the zoning by-law to encourage and incentivize additional housing units ~~take~~ <sup>s</sup> account of the fiscal and community impacts, including costs for public services and infrastructure generated by new ~~of~~ potential development under such zoning changes. As DHCD has described in its HPP guidelines, the consultant must determine the capacity of the Town's infrastructure to accommodate the current population and anticipated future growth to ensure that both current and future needs are met, including evaluation of the capacity of water and sewer systems, roads, public transit, schools, parks and recreation and any other public facilities that will be impacted by future housing development. In keeping with Warrant Article 34, the consultant will complete a two-pronged task as follows:

1. Develop location-based housing and mixed-used development scenarios that will inform the process of establishing town-wide housing production goals, both multi-year and annual; and
2. Apply a methodology that will help the Town to understand fiscal and community impacts.

As a means of projecting a range of achievable town-wide five-year and broader ten-year housing production goals, the consultant, in consultation with the HPP working group, and based on the input received from the community engagement and public hearing processes, will identify individual locations deemed to be potential candidates for new housing development. Such locations will include:

1. Discrete segments of mixed-use corridors including, but not necessarily limited to, those identified in the Town's 2016 Housing Production Plan;
2. "Opportunity Nodes" consisting of multiple parcels including, but not necessarily limited to, those identified in the Town's 2016 Housing Production Plan; that may be appropriate for new market rate and affordable housing development; and
3. Major individual parcels owned by the Town or by private institutions

The total number of discrete geographic locations to be evaluated should be not less than 12 or more than 20. (Respondents are encouraged to address this



## 12.A.

range in the Technical Proposal and, if the response has implications for cost, in the Cost Proposal.)

Completion of this Task will include the following:

1. Consider a range of development scenarios for each of the above-described potential housing development locations that would allow the Town to increase its low- and moderate-income year round housing units (as counted on the SHI) in an amount equal to or greater than 0.5% of the housing stock (131 units/year

per the 2010 census). The consultant shall also project the number of non-SHI eligible units that could be generated under the various scenarios. Definitions should include brief descriptive narrative and rationale; key applicable metrics (e.g., average FAR, total development square footage, housing mix, single vs. mixed use); and visioning tools to be used for both public engagement and the final Report.

2. Examine the Fiscal Impact and Buildout Model (FIBM) developed by the Harvard College Consulting Group for the Town and consider its potential suitability, including possible enhancements by the consultant (e.g. GIS interface, 3-dimensional software), to aid in producing the needed development and visioning scenarios, including projected fiscal impact, for each of the above-described potential housing development locations. (For further description of the FIBM, see Appendix XX)
3. Produce a town-wide map or maps that depict these housing development opportunity locations;
4. Produce a preliminary range of development scenarios for mixed-income housing; illustrate a range of potential housing unit production for each of the above-defined individual development opportunity locations and utilize basic models to depict massing under the various location-specific scenarios;
5. Evaluate and refine preliminary scenarios and projections, taking account of public input and other planning considerations, e.g., transportation, and accessibility, alternative public and private uses, neighborhood compatibility (scale and use), climate sustainability, commercial area [and business](#) vitality, public safety, open space, [fiscal impact](#) and other identified planning and citizen recommendations.
6. Recommend specific re-zoning or zoning overlays that could achieve the targeted range of new housing units, as appropriate, for each of these identified locations, based upon model scenario output and public discussion. (NOTE: This task does not include any project specifications or preparation of detailed zoning articles.)

## PROJECT SCHEDULE

The consultant shall complete its work within nine months from notice to proceed. During said time, the consultant shall present preliminary findings following approximately six months. Each respondent must address the issue of project schedule in its Technical Proposal, provide benchmarks for completion of specific tasks, and, if warranted, provide an alternative schedule including benchmarks together with an explanation.

## DELIVERABLES

The consultant shall provide the following deliverables to the Town:

- Power point presentations as well as other collateral material for each of the public meetings identified above
- Twenty bound copies of the Housing Production Plan, including a separate stand-alone Executive Summary, in both written and electronic format
- Specifications of any model that the consultant may create to generate development scenarios, fiscal analyses and/or housing production projections

## PROPOSAL CONTENTS

### I. Technical Proposal

A. The technical proposal shall contain, at a minimum, the following:

1. Letter of interest
2. Proposal interest form
3. At least three relevant references, including contact name, phone number, e-mail address, and nature of project work. For the Proposer (including any proposed subcontractors), a biography describing the proposer's history, location(s), legal composition, ownership, organizational structure and key staff; evidence of prior experience with completed projects of a similar scope and magnitude; information regarding the type of other projects and developments including location and dollar value; and history of working with neighborhood groups and local officials in a major planning project.
4. Background information on each team member including resume, relevant experience, proposed role in the development of the Housing Production Plan, and extent to which s/he has worked with other team members.
5. Certificate of Authority (if the proposer is a corporation)
6. Demographic data on the firm or the team that shows the number of individuals who are African American or African descent, Hispanic, East Asian, South Asian, and other. The data must also show the number of individuals who are women. The data must show the number of individuals who are in ownership, management, or administrative positions and separately, the numbers who are in other positions in the firm or the team (the foregoing called herein, the "Demographic Data").

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B. The Technical Proposal should also include:

1. A discussion of the Scope of Work that indicates an understanding of the scope and methodology, and how the Respondent proposes to respond to the overall objective of creating an HPP that will be eligible for approval by DHCD and will be implementable by the Town.

Respondents are encouraged to include in their Technical Proposals a discussion of alternative and/or supplemental approaches based on their experience and best professional judgment in preparing effective Housing

Production Plans. The Cost Proposal shall identify the costs associated with these alternative and/or supplemental approaches, if any.

2. A Public Engagement Plan that responds to the Town's commitment to undertaking robust, inclusive and meaningful participation. This plan should include a discussion of the public participation process considering the limitations on public gatherings including expanding upon the basic parameters provided in the above scope with the understanding that genuine

public participation involving a wide range of constituencies is critical to the long-term success of the Housing Production Plan.

Respondents are encouraged to include in their Technical Proposals a discussion of alternative and/or supplemental approaches based on their experience and best professional judgment to involve the public in difficult and potentially controversial land use issues. The Cost Proposal shall identify the costs associated with these alternative and/or supplemental approaches, if any.

3. A timeline identifying the amount of time allocated to each task, including a total timeframe for performance of the Scope of Services.

## EVALUATION OF PROPOSALS

### Minimum Evaluation Criteria

The Chief Procurement Officer (CPO) shall review all responses to ensure that each proposal includes the following aforementioned material, which shall constitute the Minimum Evaluation Criteria:

- Letter of interest
- Proposal interest form
- At least three relevant references, including contact name, phone number, e-mail address, and nature of project work. For the Proposer (including any proposed subcontractors), a biography describing the proposer's history, location(s), legal structure, ownership, organizational structure and key staff; evidence of prior experience with completed projects of a similar scope and magnitude; information regarding the type of other projects and developments including location and dollar value; and history of working with neighborhood groups and local officials in a major planning project.
- Background information on each team member including resume, relevant experience, proposed role in the creation of a Housing Production Plan, and extent to which s/he has worked with other team members.
- Certificate of Authority (if the proposer is a corporation)
- The Demographic Data.
- 

All Technical Proposals that the CPO determines meet said minimum evaluation criteria shall be referred to an Evaluation Committee, appointed by the CPO.

### Comparative Evaluation Criteria

Each proposal referred to the Evaluation Committee by the CPO shall be rated according to the following comparative evaluation criteria. Each of the criteria will be weighted equally.

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Criterion: Proposer's approach to enhancing diversity in assembling a team

Highly advantageous: The proposer's lead or co-lead consultant for this project qualifies as a Disadvantaged Business Enterprise (DBE) and is certified by the Commonwealth of Massachusetts Supplier Diversity Office (SDO). The proposal includes a clear description of the DBE's role as the lead/co-lead consultant and their involvement is specific project-related tasks.

Advantageous: The consultant's team for this project includes sub-consultant(s) that qualify as a Disadvantaged Business Enterprise (DBE) and are certified by the Commonwealth of Massachusetts Supplier Diversity Office (SDO). The proposal includes a clear description of the DBE's role as a sub-consultant and their involvement in specific project-related tasks.

Not Advantageous: The consultant's team for this project neither includes a lead/co-lead consultant nor sub-consultants that qualify as a Disadvantaged Business Enterprise (DBE), as certified by the Commonwealth of Massachusetts Supplier Diversity Office (SDO).

Criterion: Quality and breadth of proposal and understanding of the complexity of the task

Highly advantageous: Application is clear, well-organized and expands upon the content of the RFP to indicate a full grasp of the issues involved.

Advantageous: Application is generally clear, reasonably well-organized but fails to indicate a full understanding and grasp of the issues involved.

Not Advantageous: Application is not clear and/or not well-organized and fails to indicate an understanding and grasp of the issues involved.

Criterion: The breadth and extent of experience of the team members in preparing DHCD-approved Housing Production Plans

Highly advantageous: Key members of the professional team members have direct and applicable experience in preparing at least two Housing Production Plans.

Advantageous: At least one of the professional team members has prepared at least one Housing Production Plan.

Not Advantageous: None of the professional team members has experience in preparing a Housing Production Plan.

Criterion: The breadth and extent of experience in and knowledge of regulatory and land use planning in Massachusetts, including but not necessarily limited to Chapters 40A, 40B, 40R and 40S.

Highly advantageous: Key members of the professional team have extensive experience and proven ability in applying and/or drafting Massachusetts land use statutes, by-laws/ordinances or regulations.

Advantageous: Key members of the professional team have limited experience with Massachusetts land use statutes, by-laws/ordinances or regulations.

Not Advantageous: Key members of the professional team have no experience with Massachusetts land use statutes, by-laws/ordinances or regulations.

Criterion: Knowledge of and experience with real estate development and affordable housing issues, including but not limited to funding sources for subsidized housing

Highly advantageous: Key members of the professional team have extensive knowledge of and experience with real estate development and affordable housing issues.

Advantageous: Key members of the professional team have limited knowledge of and/or experience with real estate development and affordable housing issues.

Not Advantageous: Key members of the professional team have no knowledge or experience with real estate development and affordable housing issues

Criterion: The breadth and extent of knowledge of and experience with policies to promote affordable housing and the financing of affordable housing projects and programs.

Highly advantageous: Key members of the professional team have extensive knowledge of and experience with affordable housing policies and the financing of affordable housing projects and programs.

Advantageous: Key members of the professional team have limited knowledge of and experience with affordable housing policies and the financing of affordable housing projects and programs.

Not Advantageous: Key members of the professional team have no knowledge of or experience with policies to promote affordable housing and the financing of affordable housing projects and programs.

Criterion: Proven experience in designing and undertaking robust public participation processes

Highly advantageous: Key members of the team have experience in designing and implementing a complex public participation process in at least one community that places a high priority on transparent and inclusive planning projects.

Advantageous: At least one member of the team have been involved in facilitating a public participation process associated with a major planning study.

Not Advantageous: None of the members of the professional team have experience in developing and implementing a strong public participation process.

### **Evaluation Committee**

An Evaluation Committee shall be established by the Chief Procurement Officer.

The Evaluation Committee shall apply the Comparative Criteria, set forth above, to each proposal. Based on the presentation and written Technical Proposal submitted, the Evaluation Committee shall rate each proposal as: highly advantageous, advantageous, or unacceptable, in accordance with the provisions of M.G.L. Chapter 30B.

Following review of the Technical Proposals, the Evaluation Committee may, at its discretion, schedule individual interviews with any or all of the proposers for the purpose of further evaluation of a proposer's qualifications and ability to provide the required services. It is anticipated that these interviews will be conducted remotely.

Based on its review of the Technical Proposals, interviews, and Cost Proposals, the Evaluation Committee will make a recommendation to the Chief Procurement Officer for the award of a contract to the selected consultant.

The Town reserves the right to adjust the proposed plan of work and/or the proposed cost submitted by the selected consultant. The Town further reserves the right to reject all proposals and to not enter into a contract to prepare a Housing Production Plan.

### **BASIC CONTRACTUAL REQUIREMENTS**

The Town may enter into a contract with the selected Respondent. Said contract will contain, at a minimum, the following basic provisions:

#### **Hold Harmless Agreement:**

The successful Bidder agrees to defend, pay on behalf of, indemnify and hold harmless the Town of Brookline, its officers and employees from any and all claims and damages of every kind and nature made, rendered or incurred by or in behalf of every person or corporation whatsoever, including the parties hereto and their employees that may arise, occur, or grow out of any acts, actions, work or other activity done by the successful Bidder, its employees, subcontractors or any independent contractors working under the direction of either the successful Bidder or subcontractor in the performance of this contract.

#### **Workers Compensation Insurance:**

The successful Bidder shall carry and maintain during the term of this contract, workers compensation and employers liability insurance meeting the requirements of the



Massachusetts Workers Compensation Law on all the successful Bidder's employees carrying out the work involved in this contract.

**General Liability Insurance:**

The successful Bidder shall carry and maintain during the term of this contract, general liability insurance on a per occurrence basis with limits of liability not less than \$1,000,000 per occurrence for Bodily Injury and Property Damage. As a minimum, coverage for Premises, Operations, Products and Completed Operations shall be included. This coverage shall protect the public or any person from injury or property damages sustained by reason of the successful Bidder or its employees carrying out the work involved in this contract.

**Automobile Liability Insurance:**

The successful Bidder shall carry and maintain during the term of this contract, automobile liability insurance with either a combined limit of at least \$1,000,000 per occurrence for bodily injury and property damage or split limits of at least \$1,000,000 for bodily injury per person per occurrence and \$1,000,000 for property damage per occurrence. Coverage shall include all owned, hired, and non-owned motor vehicles used in the performance of this contract by the successful Bidder or its employees.

**Subcontractors:** In the case of any work sublet, the successful Bidder shall require subcontractors and independent contractors working under the direction of either the successful Bidder or a subcontractor to carry and maintain the same workers compensation and liability insurance required of the successful Bidder.

**Additional Insured:**

The Town of Brookline, its officials and employees shall be named as additional insureds without restrictions on the successful Bidder's, subcontractor's, and independent contractor's liability insurance policies and certificates of insurance.

**Proof of Insurance:**

The successful Bidder shall furnish the Town of Brookline with Certificates of Insurance and a copy of the policies if requested by the Town. The name of the project or contract to be covered must be listed on the certificates of insurance. Before commencing any performance under this Contract, the successful Bidder shall deliver all the Certificates of Insurance to the Town certifying that the policies stipulated above are in full force and effect.

**Insurance Cancellation or Material Change Notice:**

The certificates of insurance shall state that the insurance company will provide thirty (30) days written notice prior to cancellation, non-renewal, or material change including reduction of insurance coverage or limits. The notice will be sent to the Town of Brookline, Purchasing Division, 333 Washington Street, Brookline, MA 02445, via certified mail.

**TOWN OF BROOKLINE, MASSACHUSETTS  
PURCHASING DIVISION  
333 WASHINGTON STREET  
BROOKLINE, MA 02445**

**REQUEST FOR PROPOSAL**

**Housing Production Plan Consultant**

**PRICE PROPOSAL**

**TO BE SUBMITTED IN SEPARATE ENVELOPE B**

Selection of a Respondent to perform this professional study will be based upon qualifications, experience, historical performance record, understanding of needs, price, suggested innovations, and the Respondent's proven capabilities. In addition to the data and documentation being submitted by the Respondent in response to this request, the municipality will also rely on information received from the references submitted with proposal.

Bidder's Name: \_\_\_\_\_  
Name of Individual or Company Making Proposal

The prices quoted and totaled below include the cost of all labor, materials, insurance, and all other necessary expenses to fulfill the conditions of the contract. All travel costs to be incurred by the contractor shall be paid by contractor.

The following detailed price proposal is based upon the Scope of Services. Consultants are encouraged, where appropriate, to propose creative, innovative and cost-effective approaches to the Scope of Services. The Technical Proposal and Price Proposal may reflect modifications or alternative approaches to the general Scope of Services.

**TOTAL PRICE**

**\$\_\_\_\_\_**

The Town of Brookline reserves the right to choose any or all of the phases or tasks to be resulting from this RFP. **Vendors MUST provide pricing on all phases and tasks.** Some of the phases and tasks may not be awarded and deleted phases and tasks may be assumed by the Town.

**TOWN OF BROOKLINE, MASSACHUSETTS  
PURCHASING DIVISION  
333 WASHINGTON STREET  
BROOKLINE, MA 02445**

**REQUEST FOR PROPOSAL**

**Housing Production Plan Consultant**

**PROPOSAL SIGNATURE FORM**

**THIS FORM IS TO BE SUBMITTED IN ENVELOPE A - TECHNICAL PROPOSAL**

The undersigned, hereafter called the proposer, having fully familiarized him/herself with the entire Request for Proposal documents, hereby agrees and declares:

1. That prices inserted in the Price Proposal (Envelope A) cover all necessary expenses to fulfill the conditions of the contract within the time stated.
2. Pursuant to M.G.L. c. 62C, § 49A, the proposer hereby certifies that the proposer has filed all state tax returns and paid all state taxes required under law.
3. The undersigned certifies under penalties of perjury that this proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity or group of individuals.

The following items are to be completed by the Proposer, if applicable:

Our Company is:      A Corporation                      \_\_\_\_\_  
                                  A Partnership                      \_\_\_\_\_  
                                  Individually Owned                      \_\_\_\_\_  
                                  Other (specify)                      \_\_\_\_\_

Company Name: \_\_\_\_\_

Social Security or Federal Identification Number: \_\_\_\_\_

Signature of Individual or Authorized Official: \_\_\_\_\_

Title of said Individual or Official: \_\_\_\_\_

Address: \_\_\_\_\_

Telephone Number: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Article 34  
Advisory Committee Recommendation

Summary

Article 34 is a resolution which, in citing the high cost of housing in Brookline along with a housing shortage, asks Town Meeting to urge that the Town to have a policy of (1) creating an additional 3,300 housing units; (2) enact zoning and regulatory changes to create a mix of new housing; (3) consider strategies to undo the damage of 100 years of exclusionary zoning; (4) require appointees to boards and commissions to “affirmatively agree” to work towards the housing targets and “confirm their willingness” to keep these targets in mind when deliberating and voting and (5) to support the zero emissions goal by developing zoning strategies which maximize public transit use and minimized auto trips. The alternate Advisory Committee motion calls for a more balanced approach which considers “the impact costs, including the additional costs in public works, parks and open space, education and other infrastructure, that such additional housing would necessitate, as well as its impact on open space and the historic streetscape.

Background

The petitioners presented the argument that the demand for housing in the Boston region is outpacing the supply, causing the rapid increase in housing prices in Brookline. The unaffordability of housing causes hardships at many levels and citing a US HUD statistic that 47% of renters in Brookline are cost burdened (spending more than 30% of income on housing) and 23% of renters pay more than 50% on housing. The petitioners pointed out that Brookline is a signatory to the Metro Mayors Coalition compact to significantly increase the number of housing units in the region to support the robust and growing Boston economy. They assert that Brookline’s share of the regional compact is at least 3,300 units and the Town should commit to meeting its share.

The petitioners cited that when the zoning was originally written, there were blatantly racist statements in the margins of some of the maps and that the racist zoning practices were acerbated by some of the redlining practices of the 1950’s and 1960’s. They mentioned a redlining map highlighting an area in Brookline Village that appeared to be the old “Farm” neighborhood that was bulldozed in the 1960’s and 1970’s as “urban renewal” projects and is now the site of the Brook House, the B2 parcel, the Juniper St Cooperative apartment and some surrounding properties. Petitioners stated that these past practices create a strong moral argument for aggressive action now.

Other points made by the petitioners:

- The 2016 Housing Production Plan (HPP) enumerated 18 strategies which should be implemented. (Note that the HPP set a target of 400-1,000 units.)
- Zoning and, more generally, housing policy is a statement of values. If we value diversity and racial equity our policies should reflect that.
- Housing policy is underappreciated as a determinant of public health and racial equity. If you believe that more people of color should live in Brookline, there should be more multi family zones.
- Adding to a community’s required infrastructure (schools, transit, open space, etc.) due to population growth is not a new problem, and other communities have found a way to do it and so should Brookline.

## 12.A.

- It is difficult to determine how much additional school capacity might be required by an expansion in housing units. There are many factors that might influence school population increases including types of units produced and general birth trends.
- Can homeowners who bought their properties decades ago afford to buy their properties today?
- Town Boards and Commissions should be more proactive and not just protect the status quo.

### Discussion

The intent of the resolution is to promote the production of additional housing units to be reprioritized as a primary objective of Brookline's land use strategies. Its basic premise is that a significant increase in the number of housing units in Brookline will help address the regional housing shortage which is driving up the cost of housing throughout the region. As originally proposed, the resolution is seeking 3,300 additional units (a roughly 13% increase in the Town's housing stock) without considering where the units would go or the ability of the Town's infrastructure to absorb the units.

Points made by Advisory Committee members and public commenters:

- Petitioners are asking Town Meeting to sign up to a specific numeric housing production goal without knowing where in town can absorb the increased density, without any determination of the impact on quality of life including the available open space or the capacity of the education, transportation, and other infrastructure elements.
- The demand for additional housing in Brookline is virtually limitless and the requested additional units will, in all likelihood, not decrease the cost of housing in Brookline even while adding the multiple thousands of units requested. Members questioned how the economics would play out recognizing that new construction tends to be the most expensive housing.
- There was no Brookline specific analysis which supports the specific goal other than an extrapolation from the Metro Mayors statement of the regional housing goal.
- Petitioners' calculation of 3,300 new housing units is based upon area-wide development across the entire Boston Metro area, and includes I-495 communities where extensive development of tract-type housing is underway. The calculation gives no effect to the fact that Brookline is a built-out community with very little available land for additional development, and as such cannot be lumped together with distant suburbs that have large amounts of undeveloped land and that are experiencing significant housing growth as a result of large-scale development efforts.
- The 2016 Housing Production Plan (HPP) cites a target of 400-1000 units to be created which is far short of the 3,300 advocated by the petitioners. (One petitioner stated that the HPP was a defensive document which was "unnecessarily conservative" in its goals.) *At the end of this report the Opportunities map from the HPP is shown. Note that the goals stated in the areas with the highest likelihood for opportunity (the Harvard St corridor and Hancock Village) have already been met or exceeded.*
- The Whereas clause which asserts that "Brookline has signed the Metro Mayors' Coalition Regional Housing Task Force compact" is misleading. While the Town Administrator has signed this document, it was done apparently without any express approval of either the Select Board or Town Meeting.
- Minneapolis, which has been cited as an example of smart planned growth had, at one time, a much higher population than it has now so it has the infrastructure to support significant population

growth. Brookline, on the other hand, is an almost fully built-out community with very little available land for growth.

- Where is the available land for all this new housing? This will require significant increases in allowed density which needs to be studied or in some districts would result in a reduction in minimum lot sizes. Waldo Durgin and the proposed redevelopment at the Holiday Inn site at 1200 Beacon St (which was abandoned in light of significant neighborhood opposition) is, perhaps, an indication of the level of increased density necessary to produce significant additional housing units in our already developed transit corridors.
- For the past 15-20 years or so, most up zoning has been project specific or responsive to specific development opportunities. EDAB has been leading an effort to change the Town's approach to be more proactive. There may be opportunities for additional density and housing along our commercial corridors and this is going to be a focus of study for EDAB and any efforts arising out of this resolution may dovetail with and support EDAB's future efforts.
- There was no support expressed for a litmus test for appointees to Boards and Commissions. This is a responsibility of the elected Select Board.
- A number of Advisory Committee members and commenters said that there should be more emphasis in the future for creating more truly affordable units as opposed to just creating units.

#### Recommendation

The Advisory Committee is recommending an alternate motion. In place of accepting a stated target without study, it asks for an expansion of the 2016 Housing Production Plan study to determine:

“...whether making changes in our Zoning Bylaw to encourage and incentivize additional housing units, including where and at what levels, would be beneficial to the Town, after considering the impact costs, including the additional costs in public works, parks and open space, education and other infrastructure, that such additional housing would necessitate, as well as its impact on open space and the historic streetscape.”

In other words, before committing to goals the Town should have a planning process and analysis to determine what the correct course of action should be. The Advisory Committee motion also removes the litmus test on Board and Commission appointees and revises the whereas clauses to remove statements of fact that were unsupported and to provide for more precision in other assertions.

As of when this report was written, the petitioners had not accepted the Advisory Committee's alternate motion. They have proposed a revised motion which adds back most of the whereas clauses the Advisory Committee motion removed or revised and returned the resolved clauses to more of what was in the original resolution. The petitioners' major changes from the original were (1) backing off from the specific 3,300 housing target in the first resolved clause and (2) softening but not eliminating the Boards and Commissions appointment litmus test.

One last difference between the versions is the Advisory Committee motion asks for consideration of sufficient funding for the Planning and Community Development Department to conduct the requested study while the petitioners' asks that the funding be “ensured.” It is difficult to “ensure” funding without knowing the financial condition of the Town and other competing needs for Town funds at budget time. This is especially true for upcoming FY 2022 budget cycle where all indications are that we are going to have some difficult choices to make.

## 12.A.

The Advisory Committee unanimously (0-26-1) recommends NO ACTION on the petitioners' revised motion. By a 14-2-10 vote The Advisory Committee is recommending FAVORABLE ACTION on the following alternate motion:

VOTED that the Town adopt the following resolution:

WHEREAS Brookline's housing unaffordability negatively impacts low-, middle-, and upper-middle income residents, particularly renters;

WHEREAS Brookline's housing shortage may add to the unaffordable nature of the market;

WHEREAS an estimated 47% of renters in Brookline are cost-burdened (spending more than 30% on housing), and 23% of renters pay more than 50% of income on housing;<sup>1</sup>

WHEREAS the 2016 Housing Production Plan identified 18 strategies to enhance Brookline's housing supply;

WHEREAS The Brookline Fiscal Advisory Committee recommends changes to zoning to promote economic growth and prosperity;

WHEREAS decreasing car trips by increasing access to walkable, transit-oriented communities via more housing can significantly reduce per capita carbon impact for the Boston region, which is a significant town priority as expressed by Town Meeting during November 2019's Special Town Meeting;

WHEREAS building more housing in Brookline may allow new residents to live closer to job centers and decrease the amount of time spent driving and idling in traffic;

WHEREAS Brookline is a generally transit connected community via the Green Line and multiple major bus routes traversing the majority of town, and more housing near transit allows current car commuters to shift to greener transportation methods;

WHEREAS a study has shown that "anti-density zoning increases black residential segregation in U.S. metropolitan areas by reducing the quantity of affordable housing in white jurisdictions"<sup>2</sup>;

WHEREAS Boston area businesses struggle to recruit and retain employees due to high housing costs;  
WHEREAS more people living near Brookline business districts could increase local businesses' customer base;

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<sup>1</sup> According to the United States Department of Housing and Urban Development: "Families who pay more than 30 percent of their income for housing are considered cost burdened." "Affordable Housing," HUD.GOV,

[https://www.hud.gov/program\\_offices/comm\\_planning/affordablehousing/](https://www.hud.gov/program_offices/comm_planning/affordablehousing/)

<sup>2</sup> Rothwell, Jonathan, and Douglas S Massey. "THE EFFECT OF DENSITY ZONING ON RACIAL SEGREGATION IN U.S. URBAN AREAS." Urban affairs review (Thousand Oaks, Calif.) vol. 44,6 (2009): 779-806. doi:10.1177/1078087409334163

## 12.A.

WHEREAS housing instability and un-affordability have negative impacts on health outcomes;<sup>3</sup>

WHEREAS today's market rate housing may become more affordable as long as additional housing is being built over time;

WHEREAS the dramatic rise in housing costs have created financial challenges for seniors and other longtime residents. Addressing affordability will help increase the likelihood of seniors aging in place and downsizing within the community;

WHEREAS creating the zoning and regulatory space for new market rate housing may increase the possibility that Brookline's current stock of moderately priced housing may be maintained, preserving the limited naturally occurring affordable housing that does exist in town;

WHEREAS Brookline has a moral and ethical responsibility to contribute its fair share toward the vital goal of housing development;

NOW, THEREFORE, BE IT RESOLVED that Town Meeting urges the Select Board, and any other board or committee that might consider the built environment of Brookline:

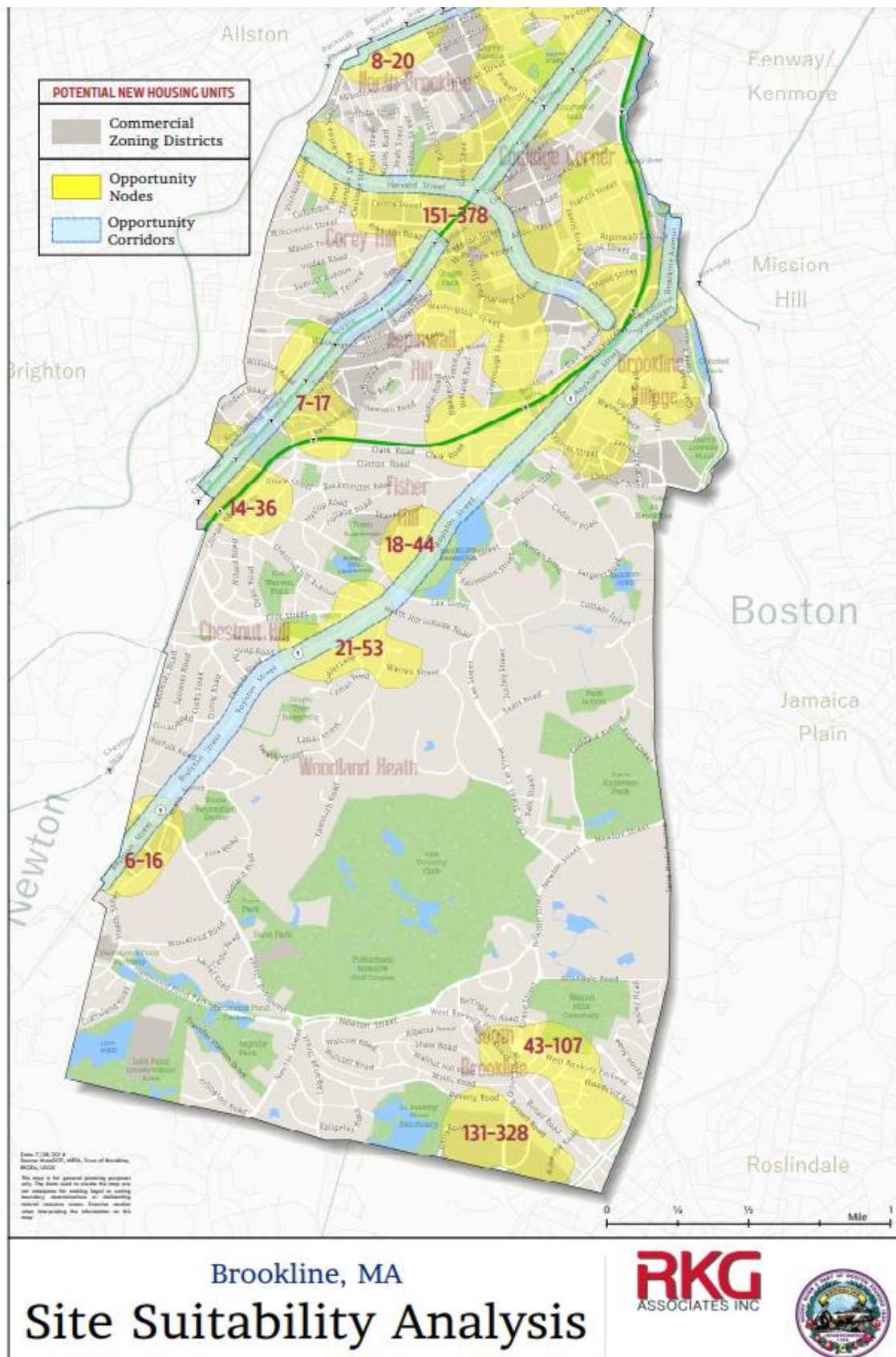
1. To engage in a planning process to expand on the specific analyses and recommendations of 2016 Housing Production Plan and determine whether making changes in our Zoning Bylaw to encourage and incentivize additional housing units, including where and at what levels, would be beneficial to the Town, after considering the impact costs, including the additional costs in public works, parks and open space, education and other infrastructure, that such additional housing would necessitate, as well as its impact on open space and the historic streetscape.
2. To develop and propose concrete zoning and regulatory changes to implement the strategies arising from and subsequent to the aforementioned planning process, and to the extent that the strategies permit higher density and the building of additional housing units, that there should be a focus on ensuring a mix of housing at different income levels: subsidized low-income housing, workforce housing developed through various means including developer incentives and Inclusionary Zoning<sup>4</sup>, and market rate housing.
3. To consider strategies that acknowledge and address racial and economic equity throughout the Town.
4. To support Brookline's Zero Emissions goal by developing zoning strategies that maximize Brookline's public transportation usage and minimize the need for car trips.
5. To consider providing the necessary budget allocation to execute the studies recommended by this Resolution.

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<sup>3</sup> University of Wisconsin Population Health Institute. County Health Rankings Key Findings 2019.  
<https://www.countyhealthrankings.org/reports/2019-county-health-rankings-key-findings-report>

<sup>4</sup> The Inclusionary Zoning by-law in Brookline currently requires projects with 6 to 15 units to contribute a cash contribution to the Affordable Housing Trust and projects with more than 15 units to allocate 15% of onsite units as affordable.





# 13.B.

## Small Business Development Committee

*This is a fifteen member committee with six vacancies.*

### Members:

1. Elias Audy
2. Raj Dhanda
3. Talia Glass
4. Melissa Tapper Goldman
5. David Leschinsky
6. Anne Meyers
7. Debbie G. Miller
8. Debbie Raisner Thompson
9. Raul Fernandez, Chair
10. Vacancy
11. Vacancy
12. Vacancy
13. Vacancy
14. Vacancy
15. Vacancy

### Non-Voting Members:

Caitlin Starr, DICR Liaison

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### Recent Activity

Tracy Chen interviewed for appointment 2.2.21

David Gladstone interviewed for appointment 1.5.21

Jenn Mason interviewed for appointment 1.5.21

Leyroy Watkins interviewed for appointment 12.22.20

Andrew Weiner interviewed for appointment 12.8.20

Colleen Suhanosky interviewed for appointment 12.8.20

*The following members resigned in 2020:*

Mark Barer

Sam Glasgow

Sandy Machado

Annika Sarin

Steve Silverman

## Online Form Submittal: Board/Commission Application Form

notifications@brooklinema.gov <notifications@brooklinema.gov>

Fri 11/27/2020 4:11 PM

To: Devon Fields <dfields@brooklinema.gov>; Ben Vivante <bvivante@brooklinema.gov>

### Board/Commission Application Form

Please use this form to apply for one of the [open Board/Commission positions](#). We welcome your application and will respond to you quickly.

Name	Colleen Marnell-Suhanosky
Address	[REDACTED]
Home Phone	[REDACTED]
Work Phone	[REDACTED]
Email	[REDACTED]
Application for specific Board/Commission?	Small business
What type of experience can you offer this Board/Commission?	I have been a small business owner in brookline for the past seven years. I'm looking forward to playing a role in the sustainability of our community and creating new ways to add value for our businesses
What type of issue would you like to see this Board/Commission address?	I would like to see our town encourage more outdoor activities. Increasing our sidewalks for pedestrians and bikers. Storefronts and sidewalk cafes engaging residents.
Are you involved in any other Town activities?	No
Do you have time constraints that would limit your ability to attend one to two meetings a month?	None , I'll make time
IF RELEVANT, YOU CAN ATTACH OTHER MATERIALS (RESUME, NEWSPAPER, MAGAZINE, OR JOURNAL ARTICLE, ETC.)	Field not completed.

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## Online Form Submittal: Board/Commission Application Form

notifications@brooklinema.gov <notifications@brooklinema.gov>

Sun 11/22/2020 9:45 AM

To: Devon Fields <dfields@brooklinema.gov>; Ben Vivante <bvivante@brooklinema.gov>

### Board/Commission Application Form

Please use this form to apply for one of the [open Board/Commission positions](#). We welcome your application and will respond to you quickly.

Name	ANDREW J WIENER
Address	[REDACTED]
Home Phone	[REDACTED]
Work Phone	[REDACTED]
Email	[REDACTED]
Application for specific Board/Commission?	Small Business Development Committee
What type of experience can you offer this Board/Commission?	30 plus years of small business ownership. president of Catering by Andrew inc. Started in Brookline, and until Covid employed over 100 people
What type of issue would you like to see this Board/Commission address?	Helping small business with the challenges of regulatory restrictions, parking issues, business growth and development
Are you involved in any other Town activities?	no
Do you have time constraints that would limit your ability to attend one to two meetings a month?	not available on Fridays and Saturdays
IF RELEVANT, YOU CAN ATTACH OTHER MATERIALS (RESUME, NEWSPAPER, MAGAZINE, OR JOURNAL ARTICLE, ETC.)	Field not completed.

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## Online Form Submittal: Board/Commission Application Form

notifications@brooklinema.gov <notifications@brooklinema.gov>

Wed 12/2/2020 2:15 PM

To: Devon Fields <dfields@brooklinema.gov>; Ben Vivante <bvivante@brooklinema.gov>

### Board/Commission Application Form

Please use this form to apply for one of the [open Board/Commission positions](#). We welcome your application and will respond to you quickly.

Name	LeRoy Watkins
Address	[REDACTED]
Home Phone	[REDACTED]
Work Phone	[REDACTED]
Email	[REDACTED]
Application for specific Board/Commission?	Small Business Development Committee
What type of experience can you offer this Board/Commission?	In my 15 years of being a small business owner, I have experience working with government leaders, residents, and businesses to make positive local change. When the town of Brookline was evaluating how to implement a bike sharing program, I worked with the business office, through my company MyBike, to figure out how that type of service could work given the towns unique dynamic. When the Brookline Chamber took over First Light, I offered to do a large scale Ninja Warrior course to engage the community in a fun new way, with the hope that people would discover other local businesses after having a blast with the ninja course. When the Brookline Village community needed help with their Village Miler Road Race, Viking stepped in to lead the popular Village Miler Road Race which takes place during the Brookline Village Fair. The strength of a community is reflected in its leaders, and I feel that my community experience through my business interactions could strengthen an already strong Brookline community. I do maintain a personal blog and active Linkedin page which you can review to get a better idea of the kind of person I am <a href="http://www.LeRoyWatkins.com">www.LeRoyWatkins.com</a> and <a href="https://www.linkedin.com/in/leroywatkins">https://www.linkedin.com/in/leroywatkins</a>
What type of issue would you like to see this Board/Commission address?	The Town of Brookline does a very good job with the business community already. I would like to see the Small Business Development Committee work towards diversifying the business owner dynamic to better reflect Brookline's diversity.
Are you involved in any other Town activities?	I am one of the owners of Viking Sports, which puts me in the heart of the towns recreation scene and I am a board member for the Brookline Chamber of Commerce.

Do you have time constraints that would limit your ability to attend one to two meetings a month?

Even though my schedule is very flexible, my only time constraints are my kids school. My wife works at Heath school, which means she has to physically be in the building leaving me to drop off and pick up the kids from school 3 days a week. In non covid times I am normally able to hire a Viking coach help with the childcare so I am able to fulfill some business obligations.

IF RELEVANT, YOU CAN ATTACH OTHER MATERIALS (RESUME, NEWSPAPER, MAGAZINE, OR JOURNAL ARTICLE, ETC.)

Field not completed.

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**Online Form Submittal: Board/Commission Application Form**

notifications@brooklinema.gov &lt;notifications@brooklinema.gov&gt;

Fri 11/20/2020 12:54 PM

To: Devon Fields &lt;dfields@brooklinema.gov&gt;; Ben Vivante &lt;bvivante@brooklinema.gov&gt;

**Board/Commission Application Form**

Please use this form to apply for one of the [open Board/Commission positions](#). We welcome your application and will respond to you quickly.

Name	David L Gladstone
Address	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
Application for specific Board/Commission?	Small Business
What type of experience can you offer this Board/Commission?	In excess of 30 years in small business both as a general manager in retail and as an officer in banks for business development
What type of issue would you like to see this Board/Commission address?	137 Bonad Rd
Are you involved in any other Town activities?	Member of the select board for climate action committee
Do you have time constraints that would limit your ability to attend one to two meetings a month?	no
IF RELEVANT, YOU CAN ATTACH OTHER MATERIALS (RESUME, NEWSPAPER, MAGAZINE, OR JOURNAL ARTICLE, ETC.)	<a href="#">DAVID L GLADSTONE RESUME 2020 (2).docx</a>

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## Online Form Submittal: Board/Commission Application Form

notifications@brooklinema.gov <notifications@brooklinema.gov>

Tue 12/29/2020 1:31 PM

**To:** Devon Fields <dfields@brooklinema.gov>; Ben Vivante <bvivante@brooklinema.gov>

# Board/Commission Application Form

Please use this form to apply for one of the [open Board/Commission positions](#). We welcome your application and will respond to you quickly.

Name	Jenn Mason
Address	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
Application for specific Board/Commission?	SBDC
What type of experience can you offer this Board/Commission?	I bring a lot of experience in working with small business and women/minority owned business. I also have experience in messaging/socialization of findings/storytelling/brand building and pivoting businesses.
What type of issue would you like to see this Board/Commission address?	I think the board is doing an exceptional job of sharing important information and I'd like to see how they can expand that to reach even more businesses.
Are you involved in any other Town activities?	I am also involved in the Brookline Villages Small Business group
Do you have time constraints that would limit your ability to attend one to two meetings a month?	no, I am eager to participate, I made about 90% of the virtual meetings throughout covid and found them extremely helpful and would love to get involved!
IF RELEVANT, YOU CAN ATTACH OTHER MATERIALS (RESUME, NEWSPAPER, MAGAZINE, OR JOURNAL ARTICLE, ETC.)	<i>Field not completed.</i>

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## Online Form Submittal: Board/Commission Application Form

notifications@brooklinema.gov <notifications@brooklinema.gov>

Wed 1/13/2021 1:07 PM

To: Devon Fields <dfields@brooklinema.gov>; Ben Vivante <bvivante@brooklinema.gov>

### Board/Commission Application Form

Please use this form to apply for one of the [open Board/Commission positions](#). We welcome your application and will respond to you quickly.

Name	Tracy Chen
Address	[REDACTED]
Home Phone	[REDACTED]
Work Phone	[REDACTED]
Email	[REDACTED]
Application for specific Board/Commission?	Small Business Development Committee
What type of experience can you offer this Board/Commission?	Analysis and Advice on Digital Marketing, Communications, Product Development, and Digital Strategy
What type of issue would you like to see this Board/Commission address?	Assistance and Cross-Industry-Collaboration Programs for Minority run business owners
Are you involved in any other Town activities?	yes
Do you have time constraints that would limit your ability to attend one to two meetings a month?	yes
IF RELEVANT, YOU CAN ATTACH OTHER MATERIALS (RESUME, NEWSPAPER, MAGAZINE, OR JOURNAL ARTICLE, ETC.)	<a href="#">TracyChen_Brookline_201114.pdf</a>

Email not displaying correctly? [View it in your browser.](#)

*A Creative, Strategic, Collaborative Digital Marketing Manager with experiences in Digital Content, Engagement Growth, Direct Marketing, Seeks Opportunities to Make A Positive Impact.*

## EXPERIENCES

### Operations Manager / Productions Coordinator / Producer / Instructor

2002–2009

Brookline Interactive Group

Brookline, MA

- **Maximized community engagement** by managing staff, operations, and programs of Training, Membership, Internship, and Volunteers;
- **Doubled member usage and production efficiency** by researching/designing/purchasing new equipment/systems within a controlled budget
- **Amplified audience engagement** by producing/coordinating 500+ studio and field programs, partnering with the local community and municipal departments
- **Increased revenues** of Training and Membership programs by designing syllabi, promoting, teaching production courses/seminars
- **Mentored** members/students-interns on the best practices of video-marketing and video-business
- **Awarded Best Public Service Announcement Video 2008**, National Hometown Video Festival

### Manager, Media Services / Content Producer

2010–2012

William James College

Newton, MA

- **Magnified digital visibility** across all channels by creating, managing assets/library, repurposing media for academic, marketing, enrollment, and development purposes
- **Achieved consistent internal communication** with institution branding by implementing a digital signage system for visual communication across campuses (Tightrope Carousel)
- **Researched cloud solutions** for media streaming; designed, implemented a new generation of classroom AV and media technology within budget (35 rooms with various functions and layouts)
- **Ensured technical success** of in-class presentations and meetings by managing and training a team of 15 specialists/assistants, provided media services, classroom support to faculty, staff, students

### Project Lead / Marketing Technology Coordinator

2013–2018

M. I. T.

Cambridge, MA

- **Optimized repeat business, loyalty engagement, lifecycle value** across global constituent-population by assessing consumer behavior, content relevance, engagement patterns
- **Grew membership 130%, revenue 209%** by analyzing annual reports, campaign goals, loyalty programs metrics, and recommending SEO keywords, new business opportunities, cross/up-selling strategies
- **Increased email engagement 137%, conversion 133%, category revenue 141%** by managing thousands of email campaigns, landing pages, online forms
- **Fostered positive online engagement** by advising best practices, leveraging current marketing technology, solving users' crucial issues

### Advisory Board Member / Head, Marketing, Fundraising, and Partnership

2018–Present

BROOKLINE CHINESE SCHOOL

Brookline, MA

- **Developing sustainable marketing and branding strategies**—"Chinese FUN," creating brand assets
- **Building community partnership & sponsorship programs** (Chinese Read/Write Contest) with the local organizations (Brookline Library, Brookline Community Foundation, Brookline Day, Roslindale Parade Foundation, Cambridge Church)
- **Executing and managing monthly marketing campaigns and special fundraising projects**: Brookline Foundation Grant, Brookline Day, Parents' Workshop, Roslindale Parade, Chinese New Year Celebration, Brookline Chinese Recitation Contest, Annual Open House, Annual Survey, Annual BBQ

**Consultant / Manager, Marketing Communications and Digital Strategy**

**2018–Present**

Self-employed (TRACY CHEN MARKETING)

Brookline, MA

- **Developing marketing/branding strategies, building partnerships** for sustainable business operations
- **Leading/writing marketing content** across channels to engage customers for social/business impacts
- **Project managing** US/Regional marketing campaigns for startup clients in the IoT, wearable tech, medical devices, energy industries, and education/non-profit sectors
- **Reviewing, planning, implementing digital and marketing tools:** CRM, project management, analytics, email, social media, digital platforms, while **Identifying and managing potential risks**
- **Increasing quality lead-gen, conversion, and brand visibility** by **executing** integrated multi-channel **social marketing strategies/tactics**
- **Ensuring timely and quality deliverables** by **overseeing** project progress, **managing/coaching** the team, collecting inputs, assigning tasks, and **delegating** resources

**\*RELEVANT EXPERIENCES IN SUPPORTING BROOKLINE ORGANIZATIONS**

**Produced hundreds of promo/PSA series, “Brookline Look,” supporting local businesses / NPOs**

Brookline Library (Brookline Reads), Brookline Music School’s Performance, Brookline Domestic Violence Prevention Roundtable, Goddard House, Brookline Youth Center, Brookline 1st Light Festival, Brookline Art Center Series, Brookline Farmers Market, Brookline Town Meetings, Brookline 300 Tricentennial Celebration, Frederick Law Olmsted’s Life (by Garry Wright), and more

**Supported/Volunteered at Multiple Brookline Churches**

Boston Presbyterian Korean Church, Bethany Church, HighRock Brookline Church

**Volunteer Consultant at multiple nation/statewide 501(c)(3) non-profit organizations**

RRDI (Rosacea Research and Development Institute), Hawaii; Pacific Community Venture (social enterprise/CDFI), California, SOAR (SOAR Management Consulting Group), Massachusetts

**Staff Management and Budget Control/Report**

Tracy Chen Marketing, Brookline Chinese School, William James College, Brookline Interactive Group

**EDUCATION**

**M.A., Digital Media: New Media, Documentary, Integrated Marketing Communication**

Emerson College, Boston, MA

**B.A., Literature**

Tamkang University, Taipei, Taiwan

**Graduate Certificate: Marketing Management and Digital Strategy**

Harvard University, Cambridge, MA

**Certificate: Data Analytics**

General Assembly, New York, NY

**COMPETENCIES**

- Project Management • Collaboration • Coaching / Leading • Customer Insights • Engagement Growth
- Lead Generation & Inbound Marketing • Branding • Content Marketing • Content Writing / Curation
- Fundraising • Grant Writing • Event Planning / Management • Direct Marketing • Social Media
- Market Research • Digital Strategy • Marketing Analytics (Quantitative / Qualitative)
- Competitive Intelligence / SWAT • Go-to-Market Strategy/Planning • Content Management System (CMS) • Customer Relationship Management (CRM) • SEO / SEM • Data Visualization / Storytelling
- Presentation Design • Video Productions

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notifications@brooklinema.gov <notifications@brooklinema.gov>

Wed 1/13/2021 1:07 PM

To: Devon Fields <dfields@brooklinema.gov>; Ben Vivante <bvivante@brooklinema.gov>

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Work Phone	[REDACTED]
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What type of issue would you like to see this Board/Commission address?	Assistance and Cross-Industry-Collaboration Programs for Minority run business owners
Are you involved in any other Town activities?	yes
Do you have time constraints that would limit your ability to attend one to two meetings a month?	yes
IF RELEVANT, YOU CAN ATTACH OTHER MATERIALS (RESUME, NEWSPAPER, MAGAZINE, OR JOURNAL ARTICLE, ETC.)	<a href="#">TracyChen_Brookline_201114.pdf</a>

Email not displaying correctly? [View it in your browser.](#)

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Newton, MA

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- **Leading/writing marketing content** across channels to engage customers for social/business impacts
- **Project managing** US/Regional marketing campaigns for startup clients in the IoT, wearable tech, medical devices, energy industries, and education/non-profit sectors
- **Reviewing, planning, implementing digital and marketing tools:** CRM, project management, analytics, email, social media, digital platforms, while **Identifying and managing potential risks**
- **Increasing quality lead-gen, conversion, and brand visibility** by **executing** integrated multi-channel **social marketing strategies/tactics**
- **Ensuring timely and quality deliverables** by **overseeing** project progress, **managing/coaching** the team, collecting inputs, assigning tasks, and **delegating** resources

## \*RELEVANT EXPERIENCES IN SUPPORTING BROOKLINE ORGANIZATIONS

### Produced hundreds of promo/PSA series, “Brookline Look,” supporting local businesses / NPOs

Brookline Library (Brookline Reads), Brookline Music School’s Performance, Brookline Domestic Violence Prevention Roundtable, Goddard House, Brookline Youth Center, Brookline 1st Light Festival, Brookline Art Center Series, Brookline Farmers Market, Brookline Town Meetings, Brookline 300 Tricentennial Celebration, Frederick Law Olmsted’s Life (by Garry Wright), and more

### Supported/Volunteered at Multiple Brookline Churches

Boston Presbyterian Korean Church, Bethany Church, HighRock Brookline Church

### Volunteer Consultant at multiple nation/statewide 501(c)(3) non-profit organizations

RRDI (Rosacea Research and Development Institute), Hawaii; Pacific Community Venture (social enterprise/CDFI), California, SOAR (SOAR Management Consulting Group), Massachusetts

### Staff Management and Budget Control/Report

Tracy Chen Marketing, Brookline Chinese School, William James College, Brookline Interactive Group

## EDUCATION

### M.A., Digital Media: New Media, Documentary, Integrated Marketing Communication

Emerson College, Boston, MA

### B.A., Literature

Tamkang University, Taipei, Taiwan

### Graduate Certificate: Marketing Management and Digital Strategy

Harvard University, Cambridge, MA

### Certificate: Data Analytics

General Assembly, New York, NY

## COMPETENCIES

- Project Management • Collaboration • Coaching / Leading • Customer Insights • Engagement Growth
- Lead Generation & Inbound Marketing • Branding • Content Marketing • Content Writing / Curation
- Fundraising • Grant Writing • Event Planning / Management • Direct Marketing • Social Media
- Market Research • Digital Strategy • Marketing Analytics (Quantitative / Qualitative)
- Competitive Intelligence / SWAT • Go-to-Market Strategy/Planning • Content Management System (CMS) • Customer Relationship Management (CRM) • SEO / SEM • Data Visualization / Storytelling
- Presentation Design • Video Productions

## Online Form Submittal: Board/Commission Application Form

notifications@brooklinema.gov <notifications@brooklinema.gov>

Tue 2/2/2021 2:35 AM

To: Devon Fields <dfields@brooklinema.gov>; Ben Vivante <bvivante@brooklinema.gov>

### Board/Commission Application Form

Please use this form to apply for one of the [open Board/Commission positions](#). We welcome your application and will respond to you quickly.

Name	Sassan Zelkha
Address	[REDACTED]
Home Phone	Field not completed.
Work Phone	Field not completed.
Email	[REDACTED]
Application for specific Board/Commission?	Select Board's Committee on Policing Reforms
What type of experience can you offer this Board/Commission?	I am an immigrant from the middle east. I can add to the voices of minorities. I am a systems engineer, and I have been trained to analyze complex problems and use a holistic approach to solve problems.
What type of issue would you like to see this Board/Commission address?	I would like to see a holistic approach to police reform.
Are you involved in any other Town activities?	I am a town meeting member from P14
Do you have time constraints that would limit your ability to attend one to two meetings a month?	I do have time restrain between hours 8 am to 11 am and between 1 pm to 3 pm.
IF RELEVANT, YOU CAN ATTACH OTHER MATERIALS (RESUME, NEWSPAPER, MAGAZINE, OR JOURNAL ARTICLE, ETC.)	<a href="#">Sassan Zelkha resume 20201207.pdf</a>

Email not displaying correctly? [View it in your browser.](#)



# Sassan Zelkha

## EDUCATION

**Massachusetts Institute of Technology (MIT)** Cambridge, MA

Master of Science in Engineering and Management

GPA: 4.5/5

June 2012

**Boston University (BU)**, Boston, MA

Bachelor of Science in Biomedical Engineering

May 2004

### Languages:

English and Farsi

## EXPERIENCE

### Redshift Bio System

Principle Project Engineer

2017-Present

- Managing contract manufacture
- Leading the project development team
- Heading the creation of system architecture to ensure reliable systems, define critical interfaces between sub-systems, and manage sub-system interactions to ensure proper system performance
- Working with project manager to gather the Voice of Customer using Design for Six Sigma methodologies

### NxStage Inc, Lawrence MA

R&D Senior System Engineer

2014-2017

- Developed system operation architecture
- Developed and optimized system parameters
- Headed the creation of system architecture to ensure reliable systems, define critical interfaces between sub-systems, and manage sub-system interactions to ensure proper system performance
- Coordinated system Failure Mode and Effects Analysis (FMEA) analysis and mitigation which resulted in more robust medical device design
- Managed gathering of system requirements and specifications using Cockpit software and led cross-functional reviews to produce coherent system requirements and specifications.
- Maintained and managed Design History Files (DHF)
- Ensured that the instrument met various standard such as IEC 60601-1 (3<sup>rd</sup> edition) by conducting test such as EMI, drop and altitude test.
- Developed fault trees that map instrument failure to component failure to assist manufacturing and service group in servicing instruments
- Worked with Marketing to gather the Voice of Customer using Design for Six Sigma methodologies
- Collaborate with departments such as service, marketing, software, manufacturing and process engineering to help solve problems which resulted in overall cost reduction for the organization

### Instrumentation Laboratory, Bedford, MA

2005-2014

Instrumentation Laboratory is the world market leader in diagnostic instruments for critical care and hemostasis. Instrumentation Laboratory develops, manufactures, and distributes in-vitro diagnostic instruments, reagents, and controls for hospitals and laboratories worldwide in Bedford Massachusetts. Instrumentation Laboratory also provides information management system, GEM Web Plus and quality control software that assists customers with quality control management.

R&D Senior System Engineer

2011-2014

- Led a team of 15 engineers, scientists and technicians on problem-solving activities which helped project stay on schedule
- Headed the creation of system architecture to ensure reliable systems, define critical interfaces between sub-systems, and manage sub-system interactions to ensure proper system performance with goal to improve system reliability by 30%
- Coordinated system Failure Mode and Effects Analysis (FMEA) analysis and mitigation which resulted in more robust medical device design
- Managed gathering of system requirements and specifications using IBM® Rational® DOORS® software and led cross-functional reviews to produce coherent system requirements and specifications. Using DOORS® software traced user needs to requirements and linked requirements to specifications
- Maintained and managed Design History Files (DHF)
- Ensured that the instrument met various standard such as IEC 60601-1 (3<sup>rd</sup> edition) by conducting test such as EMI, drop and altitude test.



- Developed fault trees that map instrument failure to component failure to assist manufacturing and service group in servicing instruments
- Worked with Marketing to get the Voice of Customer using Design for Six Sigma methodologies
- Took leadership role to assist the project manager with project coordination which included tasks such as creating short term (weekly) development plan
- Collaborate with departments such as service, marketing, software, manufacturing and process engineering to help solve problems which resulted in overall cost reduction for the organization
- Facilitated meetings and activities between various groups such as mechanical, electrical, software and analytical group to improve communication between various teams within a project

R&D System Engineer II

2008-2011

- Supported the feasibility activities of proving Lab on the chip concept which resulted in a major product development project
- Played a critical role in developing a process for mass production of single-use cartridges with ultra-sensitive detection level
- Performed independent lab research, including the developing process to separate plasma from red cells
- Captured Voice of Customer by designing survey questions as well as developed models of instruments for the purpose of demonstration

R&D System Engineer I

2005-2008

- Involved in designing and performing verification and validation of critical care and hemostasis, which resulted in on-time release of product to the market
- Developed new verification and validation protocols and reports
- Supported mechanical and software group with hardware and software optimization of critical care and hemostasis
- Played a critical role in supporting customer service and service group in resolving issues with critical care and hemostasis product family by coming up with global solutions. Examples: Developed IL's first online training video for customers which resulted in both cost reductions for customer and Instrumentation laboratory

**Evolving Technologies, Cambridge, MA**

August 2010-2012

Evolving Technologies is a social enterprise that focuses on bringing sustainable noninvasive medical solutions to third world countries. Evolving Technologies is currently working on bringing a portable endoscopy system to the third world market. Evolving Technologies was selected as semifinalist at MIT 100k competition. The team raised enough money to build several prototypes and conduct several field trials with success.

- Created a sustainable business plan
- Conducted a market analysis and created marketing material
- Developed regulatory and export strategy

**Greenfuel Technologies, Cambridge, MA**

August 2004-September 2004

Greenfuel Technologies was a MIT start up that developed a process to use the emission from fossil fuel to grow algae for the purpose of producing biofuel.

Field Service Engineer-Contractor

- Using various sensors, gathered field data on algae growth to improve total production output
- Supported mechanical and scientist development activities to improve the overall system scalability

**Tufts-New England Medical Center, Boston, MA**

September 2002-May 2003

Research Lab Technician

- Studied the effect of nitric oxide and luciferase gene on heart attacks by developing new ways to study the physical changes caused by the gene
- Installed heart telemetry device in mice for measurements of vital signs
- Sliced and stained mouse blood vessels for microscopy analysis using ImagePro

**General Electric Medical System, Lawrence, MA**

September 2003-April 2004

Senior Design Project

- Designed and created a fixator using Autodesk Inventor. The fixator was manufactured and tested to meet General Electric's Image guided surgery system standards
- Learned regulatory issues, patent policy and product development